

Approaches to develop marine fishing tourism in a Norway and Chinese regions

----Marine fishing tourism

competitiveness comparison between North Cape and Wenzhou.



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Abstract

With the increase in leisure, marine tourism demand from people, and for the economic significance of marine tourism, Wenzhou area is developing marine fishing tourism and Fishing fun tourism in response. This study use Porter's diamond model to compare Marine fishing tourism industry international competitiveness among two countries and areas: North Cape in Norway, and Wenzhou area in China. At the same time, fishing fun tourism arises as a new form of Marine fishing tourism in Wenzhou area, with the Dongtou County becoming an important Fishing fun tourism region in Wenzhou area.

This paper uses qualitative method which mainly focuses on conducting, semi-structured interviews, and questionnaire survey and participant observation to identify the important factors which makes marine fishing tourism more internationally competitive in Norway than those of China. The study analyzed how the factor conditions, demand conditions, related industries, firm strategy, government and chance influence the competitiveness of MFT and the development situation of the MFT. After analyzing these determinants and factors, the study compared the competitiveness between the two countries, and made suggestions on approaches to develop marine fishing tourism in the Wenzhou area.

Finally, this study also analyze why Wenzhou Fishing fun tourism is well-developed while marine fishing tourism is slowly developed in Wenzhou. And after making comparison of the development situations in these two industries, this study give the approaches to develop MFT and how to expand to a larger scale in the region of Wenzhou.

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Abbreviations

GASC: General Administration of Sports of China

MFT: Marine Fishing Tourism

FFT: Fishing Fun Tourism

FFTA: The Fishing Fun Tourism Associations

ICES: International Council for the Exploration of the Sea

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Chapter one

1 Introduction

1.1 Marine fishing tourism in Wenzhou, China and North Cape, Norway

1.1.1 The Wenzhou marine fishing tourism is in its beginning stage

This paper examines approaches to develop one particular type of marine tourism in Wenzhou area of China and North Cape in Norway: marine recreational fishing tourism. Marine fishing is not only a type of elegant sport, but could as well be an important promoter of local socio-economic development. Marine fishing tourism, as a kind of recreational fishery, would have prominent significance for adjusting the fishery structure. Wenzhou governments expect that marine fishing tourism can bring social and economic benefit to people. However, a large proportion of Chinese tourists are not familiar with marine fishing tourism.

The first reason why I study MFT in the Wenzhou area is that Wenzhou is my home town. The second reason is that Wenzhou area is an important location to develop marine tourism. Wenzhou City is located in the middle of China's coastline, is the most important and also largest city in the south of Zhejiang province and north of Fujian province. As the most convenient gateway to the sea for the people living in inland area such as the west part of Zhejiang province and Jiangxi (west of China) province, Wenzhou is the most important marine tourism center in the region (Beichun Su, 2008: 454). The third reason is that, the Wenzhou government wants to develop MFT in this area. Marine fishing tourism has received considerable attention from Wenzhou government and local government in Dongtou County as well: in 2009, the General Administration of Sports of China (GASC) gave the name of "the national fishing spot"

to the Dongtou County (Dongtou government, 2011). Dongtou County holds “international reef fishing and the National Fishing Champion” annually in the latest three years. The vice director in social sport department of GASC, vice mayor of Wenzhou city and local government in Dongtou County participate in this activity yearly and they hope this sport can be popularized by their efforts, and stimulate the development of marine tourism in this area(ibid.).

Last but not least, the Wenzhou area has abundant physical and geographical resources to promote marine fishing, with a higher net personal income than other regions, as well as some well-developed tourist attractions. Thus, the Wenzhou area has all the attributes required to develop marine fishing tourism. However, so far the marine fishing tourism industry has still not been well developed, for many reasons.

Dongtou Islands (in the east sea of Wenzhou area) and other two main national sceneries in Wenzhou, Yandang Mountain and Nanxi River, complement with each other. These three are the main attractions in Wenzhou. Tourists visit Wenzhou to enjoy the three scenic spots “mountain, river and sea”. In the Dongtou islands, an interesting new industry started in recent years and I give it a name “fishing fun tourism” translated from Chinese “Yujiale”. It started when fishermen took tourists in boat to go fishing, and tourists enjoy the scenery in the sea, see fisherman casting net to fishing, and eat their catches in restaurants.

This study is to find the approaches to develop MFT. The marine fishing tourism industry has not been established for several reasons, while it has been well-developed in Norwegian municipality of North Cape for almost two decades. By discussing the local conditions for MFT in the two international locations, I want to compare them to find their difference in local conditions or factors for MFT development. By analyzing their differences in development factors, I want to find what factors may contribute to the advanced or successful MFT. Then, I want to analyze the possibilities for building competitive marine fishing tourism industry in Wenzhou.

1.1.2 Marine fishing tourism in Norway

In some European countries, marine fishing tourism has developed on a large-scale, for example, in Norway. Even though their marine fishing management methods and regulations are different in many ways, the Chinese can learn something from European MFT to develop this industry in Wenzhou.

The reason why I chose North Cape to study MFT is because firstly I study in Norway for two years. Therefore it can be easier for me to get first hand data and do participant observation and interviewing in North Cape. Secondly, North Cape has well developed MFT, and is valuable to study the local condition of MFT there. In addition, my Norwegian supervisor suggested this area to me.

Recreational fishing is an important part of Norwegian leisure. Norway has a long history and adequate fishing resources and good management of marine fishing tourism. In North Cape (Norway), marine fishing tourism is well-developed and on a large scale with increasing numbers of tourists. For instance, foreigners have been visiting Norway to fish since the beginning of the 19th century. The first fishing tourists visiting Norway were British lords who were fishing for salmon in lakes and rivers (Berntsen, 1990; Borch et al, 2004:47). In recent years there has been a marked increase in the number of marine fishing tourists visiting the country. Approximately 300,000 tourists annually visit North Cape (Switch Back Travel, 2011). The areas around North Cape in Norway “the Northern most place in Europe” are among the best fishing grounds in the world (North Cape, 2010). The North Cape municipality, in Northern Norway, encompasses mainly the island of Magerøya and some parts of the mainland Finnland (ibid.). (North Cape’s total area is 925 km² and land area is 891 km². Thus the land area of Wenzhou is 11 times bigger than North Cape, and the North Cape land area is 10 time bigger than Dongtou Island).

It is imperative to explore the motivation of people why they go marine fishing there, how for instance North Cape managed to develop it to such a large scale industry, what

kind of difficulties there are limits its development. Furthermore, it is also necessary to study how MFT operators manage their business and how the governments manage the resources, facilities, regulates in such a large scale for a large group of marine fishing tourists in a sustainable way. In so doing, we can not only analyze how to enlarge marine fishing tourism in North Cape, but also find the approaches to develop marine fishing industry in Wenzhou area, and what drawbacks there are and how it should be managed and regulated when it develops to be a large scale industry for the large population there.

1.2 Study area

The Chinese part of this study mainly focuses on the Wenzhou area. The Wenzhou area has abundant physical and geographical resources for marine fishing, and higher net personal income than other regions, as well as some well-developed tourist attractions. With a population of 9.12 million and a coastline of 339km (211m), it has 11,784 km² land area, and it covers a sea area of 11,000 km² (Wenzhou municipal bureau of statistic, 2012) and thus is rich in marine resources. Rugged mountains and tranquil waters in the tourist areas make tourism well developed in Wenzhou. The area also has a humid subtropical climate, which makes marine fishing suitable for more than eight months of the year. Despite the availability of potential for the development of MFT in Wenzhou area, this industry remains largely underdeveloped.

Distribution of Fishing for Fun Tourism (FFT) sites are mainly swarmed in Dongtou Island. The Wenzhou area has several locations involved in marine fishing tourism at present: Dongtou Island, the Nanji Islands National Nature Reserve, Beiji Islands, Dabei Islands and Xiaguan County (see Figure 1.1 and 1.2).

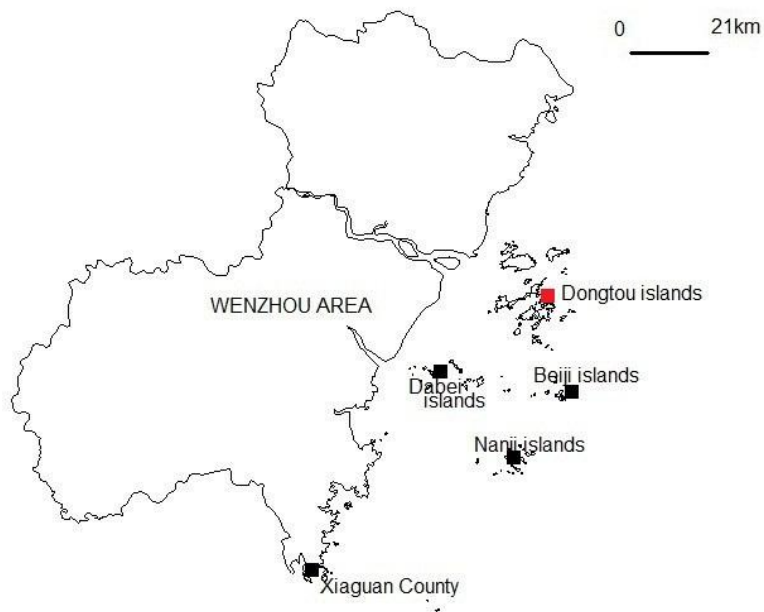


Figure 1.1 Distribution of FFT and MFT sites in Wenzhou area



Figure 1.2 The location of Wenzhou in China (the red)

An SVG map of China with Wenzhou city highlighted in red (The University of Texas at Austin, 2012)

According to statistics from the fishing club organized by the Wenzhou Fishing

Association, there are nearly 200 registered members in Wenzhou fishing club. However, it is estimated that the total number of fishing enthusiasts is more than 1,000 in Wenzhou, and this sport is especially active in coastal cities such as Cangnan city and Pingyang city (Wenzhou Government, 2010). Yet this number of sport fisher men is quite small, in relation to the large population of the Wenzhou area. Most fishing enthusiasts mainly communicate with each other through informal civil society organizations and it can be said that marine fishing tourism has not been well established in many parts of Wenzhou area.

Dongtou County is a large fishing field in the Wenzhou area, and an important place for anglers to go fishing as well. In 2010, the total sea food production of Wenzhou area is 587 thousand tons (Wenzhou Municipal Statistic Bureau, 2011). The total sea food production of Dongtou County is around 142 thousand tons in 2010, accounting for almost one fourth of the total sea production of the Wenzhou area, and around 9% of them are from fish farming (Wenzhou Sea and Fishery, 2012). This county consists of 103 islands, has abundant tourism resource and it is famous for its tourism. According to the Dongtou governmental statistic, there are 1670 hotel beds in Dongtou County (Private information from fieldwork, interview with Mayor in Dongtou). Currently, there is no formal MFT company in Wenzhou (interview with anglers and marine fishing boat drivers in Wenzhou). Fishing enthusiasts organize together informally (ibid.). Some of them even rent wooden fishing vessels with no license or even lower safety boats for the low rent. The number of angling enthusiasts has been increasing during the last three years in Wenzhou, and the boat available for marine angling is increasing too (ibid.). In previous years, anglers can only go fishing with fishermen, and there was no special boats reserved or used purposely for recreational fishing. Nowadays, there are at least 8 boats which are used only for sea recreational angling (ibid.). All of the 8 boat drivers are local people from Dongtou County (interview with anglers in Wenzhou). While in Dongtou County, there are 36 small “fishing fun tourism” companies, which are operated mainly by local fishermen. They also offer boats for anglers and the rent is around 506 Euro per 7 hour for one boat (interview with

FFT operators in Wenzhou). As another kind of marine tourism, the fishing fun tourism (FFT) has lots of similarities and differences with MFT.

1.3 Research question

My assumption is that MFT is not internationally competitive in Wenzhou area, because it is not a part of Chinese culture. However, the Norwegian case is internationally competitive in MFT. My assumptions may be false or true, and my research will verify or falsify them.

For many reasons, FFT developed in the Dongtou County, and laws and regulations were given by the local government in this region. However, there is no specific MFT culture in the Wenzhou area, and MFT has not been well-established. This paper argues that drivers or determinants mentioned in Porter's diamond model influence the competitiveness of MFT and development of FFT. In order to prove this, some research questions are asked:

1. What are the main factors that influenced a successful development of internationally competitive MFT in North Cape, Norway and Wenzhou area in China?
2. Are there any other factors in addition to the key competitive factors that can continue to help MFT and FFT expand to a larger scale in the region of Wenzhou?
3. Why did FFT develop in Dongtou County, but not MFT companies?
4. The Chinese culture does not have the marine recreational fishing culture, but with the improvement of per capita income in Wenzhou, will people participate in the European type of marine fishing tourism? Should Wenzhou develop MFT in the same way following European MFT model in the future?
5. What can Wenzhou region learn from North Cape when developing MFT?

1.4 The structure of the thesis

This thesis is composed of the following chapters. Chapter 1: The introduction of marine fishing tourism, statements of research questions and the introduction of study area. Chapter 2: Introduction of relevant theories and the theory model for comparing Wenzhou marine fishing tourism development with Norway. Chapter 3: The methodology of fieldwork research. Chapter 4: competitiveness comparison between Wenzhou and Norway. Chapter 5: The advantages of Fishing Fun Tourism development in Wenzhou compared with marine fishing tourism.

Chapter 6: conclusion.

1.5 Significance of the study

In recent years there has been an increased interest in marine recreational fishing. Globally there is a growing awareness of the substantial economic, social and cultural impacts of recreational fisheries (Cooke and Cowx 2004; AasØ: 857–859). European MFT and the Chinese FFT are two new-born types of recreational fishing activities in Wenzhou. In the United States, as in other countries, recreational fishing opportunities confer substantial social benefits (Trudy Ann Cameron, 1992: 303). As a comprehensive utilization of fishery resources, recreational fishing is a breakthrough in fishery development; it is becoming a new approach to problems in fishery development and a strategic choice to adjust the structure of the fishery industry (Chai, 2008: 5). In addition, it can also enrich recreational activities and people's cultural life in Wenzhou area, create employment for people in this area, optimize the structure of tourism industry, and reduce pressure on nonrenewable tourist resources, because the marine fishing tourism is considered to have higher economic benefit and lower ecological impact than traditional fisheries.

This study is looking for what are the factors for development of successful competitive MFT in Norway compared with Wenzhou area. And why the development

of FFT succeeds in the Wenzhou area while the MFT failed in the Wenzhou area. Through these comparison and analyses, this study gives advices what the MFT in Wenzhou area should learn from Norway, and also what MFT can learn from the success of FFT.

1.6 Challenges

In this study, the development and management of recreational fisheries is lack of a theoretical platform. Because of the lack of a theoretical based presentation of the current recreational fisheries, there is no systematic, comprehensive statistical systems and data (Trude Borch, 2004: 47).

Chapter two

2. Theoretical framework

2.1.1 The conception of marine fishing tourism

Traditionally, marine fishing tourism is an important part of marine tourism or recreational fishing. To begin with, we discuss the term “marine fishing tourism”. Orams (1999) defines marine tourism as including “those recreational activities that involve travel away from one's place of residence and which have as their host or focus the marine environment (where the marine environment is defined as those waters which are saline and tide-affected)” (Orams, 1999: 6). The term marine tourism covers tourism activities such as marine wildlife viewing (whales, dolphins, seabirds), diving, fishing, windsurfing, ocean cruising, and beach life (bid.). This project concerns the approach to developing one particular type of marine tourism: recreational fishing, in the Wenzhou area of China and in North Cape, Norway.

Recreational fishing is defined as fishing either for personal consumption or for leisure (Hickley & Tompkins, 1998: 139). It is an important part of modern leisure (Washabaugh & Washabaugh, 2000: 24). The refined type of recreational fishing has, throughout history, been freshwater fishing (Campell, 1989: 76–88.). To distinguish from commercial or subsistence fishing, recreational fishing in Europe is defined by Pawson et al. (2007: 7-11) as follows:

- not deemed to be commercial fishing, in that recreational fishers do not sell the fish they catch;
- is not undertaken for predominantly subsistence purposes;
- is not undertaken for primarily cultural or heritage purposes, though these may provide justification for continuance of activities not deemed to be commercial;
- is often synonymous with angling (the activity of catching or attempting to catch fish on hooks, principally by rod and line or hand-held line), but may

include the use of small boats equipped with nets, long-lines or pots to catch fish or crustaceans, capture of fish by divers with spear guns, and hand-gathering of shellfish from the beach or shore (ibid: 7-11).

The concepts of marine tourism and recreational fishing above identified the traditional definition of Marine fishing tourism in European country. While, recreational fishing is a part of Norwegian identity, it still has wider range in its content.

In Norway, the recreational fishing is governed through the principles of management of wild living marine resources. The recreational fishing was in the governance document Ot.prp.nr.69 (1995-96) categorized into the following three categories:

- Group1: Those who do recreational fishing with focus on recreation and sport. In this group are people living along the coast and tourists from Norway and abroad.
- Group2: Those who do recreational fishing with the aim of food gathering and consumption. In this group are a lot of local inhabitants along the coast.
- Group3: those who do the recreational fishing because of an extra income. They are not professional fisher men, but people with another work and a lot of spare time.

(Source: The law on the management of wild living marine resources, Marine Resources Act chapter4, Ot. prp.nr.20 (2007-2008) kap.73.1)

2.1.2 The definition of MFT and FFT in Wenzhou area

In the Wenzhou area, there is no law on the MFT and the definition of MFT is not very clear. Most anglers go marine fishing there not only for recreation, but also for food. Thus, MFT in Wenzhou was started for tourists who travel to go fishing both for

recreation and for food. Some Chinese scholars consider that both MFT and FFT are belonging to recreational fishery. Now Wenzhou government want to enhance MFT and FFT to reduce commercial fishing catch intensity, reassign fishery surplus labor force and promote fishing village economy (Dongtou government, 2011). This is because MFT is tourism and can create more employments for fishing village. Fishermen's life can be improved and the total catch could be decreased if they change their job from traditional fisherman to MFT or FFT operators.

Taiwan scholar Jiang Jirong (2002: 47-52) defined the concept of recreational fishery as the activities that may use the following things to develop tourism after people's planning and design: the equipments and space in fishing village, fishery products, fishing gears and fishing method, fishery commercial activities, the aquatic animals, natural fishery environment and human resources of the fishing villages. By using these, then people's experience in the fishing village and fisheries is enhanced, so is also the travel quality, and improvement in income of fishermen, and promote the fishing village development.

In Wenzhou, the fishing fun industry (FFT) is the more popular and highly developing marine tourism. This industry has some similarities and difference with traditional European Fishing tourism. The Fishing fun tourism in Dongtou County (the main area involved in FFT) is a new kind of tourism that started and operated by fishermen themselves. Fishermen use their own housing, skills, etc., and take tourists to fishing with them, eat the catch in fishing fun tourism restaurants and sell fishing-lifestyle experience to tourist. This industry contains fishing fun tourism restaurants, hotels, shops, leisure fishing boats, and other sub-sectors as well (Private information from fieldwork, interview with Mayor in Dongtou). According to my observation during field trip, FFT tourists take boat with fishermen and see fishermen casting net during fishing. However, tourists did not use any tackle or do angling by themselves. Tourists in European MFT are angling-activity-dominant. Different from European MFT, FFT tourists are not activity dominant, they mainly want to experience fishermen's life,

enjoy the coastal scenery, eat the catch and taste Wenzhou cuisine in FFT seafood restaurants.

2.2 MFT competitiveness in Porter's diamond model

This study intends to find the approaches to develop MFT. As mentioned above, the marine fishing tourism industry has not been well established and developed in the Wenzhou area for several reasons, while it has been well-developed in North Cape for decades. By discussing the local conditions for MFT in the two international locations, I compared them to find their difference in local conditions or factors for MFT development. By analyzing their differences in development factors, I found what factors may contribute to the advanced or successful MFT. I then, analyze the possibilities for building competitive marine fishing tourism industry.

Porter addresses a question, why do some social groups, economic institutions and nations advance and prosper? This study draws on these questions posed by Porter to explore why MFT is well developed and managed better at some places than others. Porter's two previous monographs, competitive strategy and competitive advantage is explanatory theory of the international pattern of competitive advantage, explaining why particular countries succeed more in particular industries than others (Porter, 2000: 33-173). As noted earlier, the study would also draw on this approach to determine why some study areas are able to develop competitive MFT industry than the other(s).

Importantly, attention is required to globalization processes, financial, technological and scientific factors, markets, the organization of production and processes of negotiation, all of which play a role in producing 'a complex set of interrelated tendencies' (Dicken, Peck & Tickell 1997: 161). These tendencies interact with each other in unforeseen ways and result in economic, demographic and socio-cultural effects with different consequences from region to region, and also in this case, MFT in Norway and China. For this reason, contemporary economic geographers are interested in geographical context and its contingent ability to explain regional economic

activities based on local technical, social and institutional conditions (Martin et al., 1994: 21-53). Thus for these two study areas, the factors mentioned above can greatly influence their ability to develop a competitive MFT industry.

2.2.1 The term of Competitiveness

Superficially, competitiveness appears to be a simple concept derived from the Latin word *competit*- 'striven for' in early 19th century according to the Oxford Dictionary. But as we try to measure competitiveness we begin to understand the difficulties of defining it because competitiveness is both a relative concept (thus superior relative to what?) and is usually multidimensional (thus, what are the salient qualities?) (Scott and Lodge, 1985: 6). The Global Competitiveness Report of the World Economic Forum defines competitiveness as “the set of institutions, policies, and factors that determine the level of productivity of a country”.

As viewed by Franziska Blunck (2006: 1-5), competitiveness can be defined for the company, as ability to provide products and services as well or more effectively and efficiently than the relevant competitors. At the country and the industry level, competitiveness is the ability of the nation's firms to achieve sustained success against (or compared to) foreign competitors, again without protection or subsidies. Measures of competitiveness at the industry national level include overall profitability of the nation's firms in the industry, the nation's trade balance in the industry, the balance of outbound and inbound foreign direct investment, and direct measures of cost and quality at the industry level. Competitiveness at the industry country level is often a better indicator of the economic health of the nation than competitiveness at the firm level (*ibid.*).

In this study, the aim is not to measure the competition between Wenzhou MFT with North Cape, but to find what factors that contributes to the advancement or successful development of competitive MFT in these areas. More attention is attached to the

difference in the local condition for develop MFT between these territories.

In my opinion, a competitive MFT in a certain area is not only high profitability, good efficiency, but also good quality of service that is provided. However, the meanings of good quality MFT differ from tourists, operators and governments. Tourists consider good scenery in coastal area, some special type of fish, different types of fish, big catch, good service in fishing camp, cook and share your fish after fishing, good boat and rod, spend time with particular person as good quality MFT.

To operators on the other hand, high profitability, high satisfaction from tourists and good market, supporting policy from government, are mostly mentioned as the factors or indicators of good MFT.

Government want revenue and employment from MFT, therefore, they want to find a healthy balance between the social-economic benefits and resource use on a sustainable basis. And therefore the ability to do so constitutes good MFT for the government.

2.2.2 Comparative advantage and Competitive advantage

To understand the concept of competitiveness in MFT, I shall first of all discuss the concepts of comparative advantage and competitive advantage in marine fishing tourism first.

Firstly, MFT service and products are internationally tradable. Richardson (1987: 61) notes that the travel and tourism sector is “fully internationally tradable in the sense that supplier from any country could compete in these markets in a fully liberalized institutional environment.” With a globalized world economy, cheap international flight tickets and improving living standard, travelling abroad become more and more

frequent and easy for people. The activities of MFT tourists travelling abroad for the purpose of fishing, makes MFT service and products internationally tradable: tourist anglers choose their favorite destination to travel and experience their service, and consume some of their products (fishing for food). The factor conditions and other determinants (shown later in the Porter's diamond model) in territory can affect the prices and qualities and so on of the MFT services and products in the international market.

In economics, the theory of comparative advantage, which was first described by David Ricardo (1817; Baumol, William J. et al: 50), refers to the ability of a person or a country to produce a particular good or service at a lower marginal and opportunity cost. However, Porter's theory of tourism comparative advantage concerned a destination's factor endowments, both naturally occurring as well as created by human. Porter (1990) identifies five broad categories of resources: human resources, physical resources, knowledge resources, capital resources, and infrastructure (Porter, 1990: 74). In marine fishing tourism, it seems to be better to add marine fishing culture resources as another resource category, as its significant importance to the MFT development.

Geoffrey (1999) identify that, where comparative advantages constitute the resources available to a destination, competitive advantages relate to a destination's ability to use these resources effectively over the long term (Geoffrey 1999: 143). The study looked at how Norway (North Cape) and China (Wenzhou) are able to develop competitive MFT industry based on their competitive advantage. When we talk about the effectiveness that MFT destination's ability to use resources, we have to mention resource management, governance companies' marketing strategies, and other factors that relate to resource utilizing in the MFT destination.

In addition, several scholars have studied the competitiveness of tourism. In the case of Slovenia, Doris Omerzel Gomezelj (2008: 294–307) use model to capture the most

important elements of competitiveness mentioned in the general literature and the main destination competitiveness elements proposed by tourism researchers. Its main, so called competitiveness determinants are Inherited Resources, Created Resources, Supporting Factors and Resources, Destination Management, Situational Conditions and Demand Conditions. But his model is to find the determinants to contribute overall tourism competitiveness of the destination. In my study, I will use the Porter's diamond model to analyze only how MFT is developed on competitive bases in the two study areas.

2.3 Porter's diamond model

The thesis used Porter's diamond framework to compare and explain the development of competitive marine fishing tourism in Wenzhou area and Norway. Porter's (1990: 33-173) "five forces of competition" model identifies the basic sources of competition at the company and product level. In Porter's study on the determinants of international competitiveness, he suggested that the home country's "diamond" is the source of competitive advantage for domestic firms (ibid.). The competitive advantage of a firm depends upon one, or more, of the four key determinants of the nation's international competitiveness (ibid.). The successful domestic firms build upon this home base and can then export or engage in outward foreign direct investment. In short, Porter's model states that a global firm needs to have a sustainable competitive advantage based on the successful utilization of components of its home country's diamond. Significantly, this study also looked at those elements of the MFT destination in the two areas that can be improved and helped them developed and internationally competitive industry.

The Porter model is based on four country-specific "determinants" and two external variables, chance (unforeseen contingencies) and government (ibid.). Porter's four determinants and two outside forces interact in the "diamond" of competitive advantage, with the nature of a country's international competitiveness depending upon the type and quality of these interactions. The four determinants for a nation "... shape the

environment in which local firms compete and promote or impede the creation of competitive conditions"(ibid: 71). As shown in Figure 2.1, the four determinants are:

1. Factor conditions which entail the nation's factors of production, including natural resources and created factors, such as infrastructure and skilled labor. This study looked at the impact of availability and level of development of natural resource (potentials of marine fishing industry) as well as infrastructure and the extent to which it enabled the development of competitive MFT in the study areas.
2. Demand conditions included the nature of home demand for products or services and the degree of sophistication of buyers. In this regard too, the level of local patronage of MFT in the study areas and its impact on developing a competitive industry was also explored.
3. Related and supporting industries: the presence or absence of supplier and related industries that, themselves, are internationally competitive are also important factors that influenced the development of competitive MFT industry in China, Norway.
4. Firm strategy, structure and rivalry: the domestic rivalry of firms and the conditions governing how companies are created organized and managed. None of these determinants is new or unexpected (Porter 1990: 71). Porter's principal contribution is to bring them together in a manner useful for business and government strategy. As Porter (1990) noted however, the diamond is a mutually reinforcing system, and strengths in other parts of the diamond may overcome factor disadvantages (ibid: 72).

Chance events are occurrences that have little to do with circumstances in a nation and are often largely outside the power of firms (and often the national government) to influence, such as war, breakthroughs in basic technologies and major shifts in foreign market demand (Porter, 1990: 124).

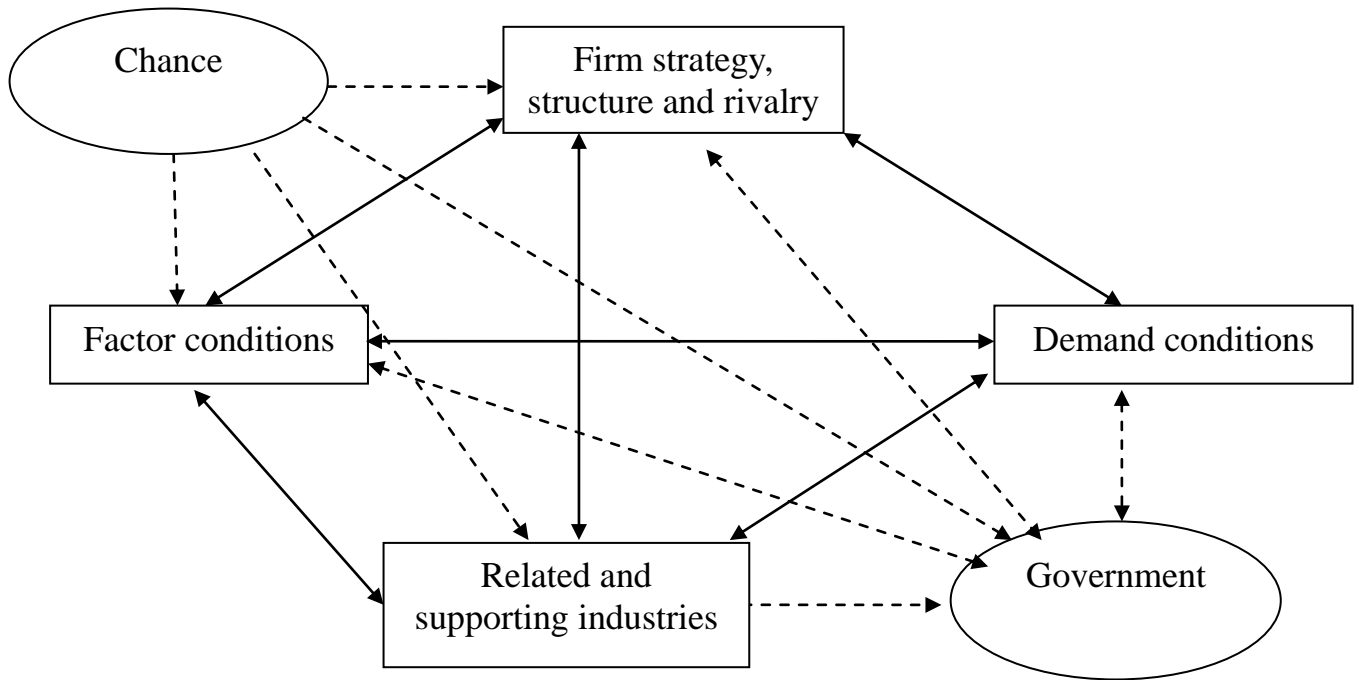


Figure 2.1 Porter's Diamond Model (Porter 1990: 127)

This study looked at the interplay of these factors and how they work to affect the development of competitive MFT in the study areas.

2.4 MFT competitiveness using Porter's diamond

Firstly, as it was mentioned above, factor conditions are the nation's factors of production, including natural resources and created factors. Physical, historical, cultural, and recreational resources often represent primary travel motivations (Geoffrey et al, 1999: 140). Some MFT's factors of production are consumed and can be similar as other industry; however other natural resources are not consumed. Some materials such as fish stock, boats, labors, fishing tackles are basic precondition for MFT resort. Fishes are consumed when fishers take and eat it, but it is renewable if it is used sustainably. Thus, the sustainably use of resource should receive more attention. While, some factor conditions and production factors such as good scenery, fishing villages with fishing culture and history, will not be consumed when tourism products are produced, they still play a significant role in the development of competitive MFT

industry. The stock of created resources, changes over time but, because these are created, they are typically more renewable than naturally occurring resources (Geoffrey et al. 1999: 142). The stock of MFT's created factors are uneven in different countries and areas during different time, for instance, expertise of marketing and professionals of fishing skills and other marine fishing tourism knowledge can be scarce in developing countries. In MFT, physical, fishing cultural, and recreational resources often represent primary anglers' travel motivations

There are interactional relations between one determinant and others among the four determinants. For example, there are interactional relations between factor conditions and the firm strategy and the other three: structure and rivalry, demand conditions, related and supporting industries. Firstly, for some anglers for instance, the motivation to go fishing is that, it allows them to spend time alone; fishing gives sense of peace and relaxation. Thus, a quiet and peaceful place with low population density and high fish stock (factor conditions) can be the MFT tourists' motivation. On contrast, the overuse of resource will limit MFT demand. Secondly, some other related industries such as commercial fishery are usually competitive for those geographical places that boast of the fish stock. Thirdly, the MFT firm strategy is adjusted according to the resource volume and regulations in resource use.

Secondly, demand condition is the nature of home demand for products or services and the degree of sophistication of buyers (Porter, 1990: 87). A high domestic demand confers stability and encourages improvement and innovation. Most national tourism industries depend upon domestic demand for the majority of their business (Geoffrey et al, 1999: 143). Foreign demand thrives more readily when domestic tourism is well established. Related and supporting industries that possess their own advantages can stimulate an industry (Porter, 1990: 100-105). In MFT, demand from local customer is the most sensitive part of their market. When MFT is well-developed, domestic demand is a strong support to MFT. Tourists are certainly from other area or other country, but the development of MFT is closely related to the indigenes' marine fishing activities.

For example, in Norway a part of Norwegian MFT market is self-sufficient because a lot of people go fishing by themselves, but a large part of demand depends on external demands or market. The MFT in North Cape though does not rely on the domestic market, and Norwegian seldom tourists go marine fishing there. But this can be seen as the result of domestic competition, because people can easily go fishing in other fishing sites nearby. In Wenzhou area, in my opinion, the high growth rate in the number of sea anglers in China is a golden opportunity for the MFT development. Therefore, my study investigated the role of local demand of MFT in the two territories of Norway, and Wenzhou.

Thirdly, related and supporting industries that possess their own advantages can stimulate the development of competitive MFT. The presence or absence of supplier and related industries that, themselves, are internationally competitive plays an important role in stimulating competitive development of MFT. For example, leisure and recreation, retailing, and entertainment industries share activities that complement the tourism industry. Supplier industries (accommodation, transportation, food services, the arts, et al.) that are either unique or cost efficient, confer advantages to the tourism industry (Geoffrey et al 1999: 143). In Norway, some other tourism programs do not influence the MFT directly, for example, anglers seldom need souvenir and arts, but souvenir and arts promote the North Cape tourism as the destination for tourists, and the development of tourism can drive the development of MFT. Other related industry such as commercial fishery, ship chandlery and fishery education institutions can promote the MFT directly. The commercial fisheries are usually competitive and well-developed in MFT destinations for the fish stock advantages in these areas. The innovations, knowledge from commercial fishery can lead to the development of MFT. Moreover, there is similarity in innovation mechanism within the related industries, such as commercial fishery, which can also absorb investments and talents to manage these industries and use new ideas to promote these MFT industries. These industries may use the same technology in fishing or share the same marketing strategies and financial service as MFT, thus promote MFT directly (As shown in figure 2.2).

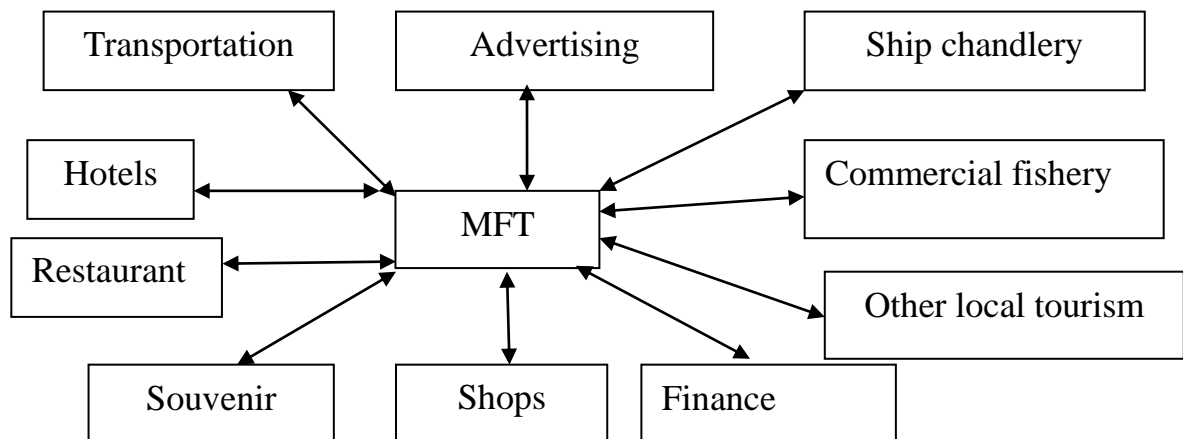


Figure 2.2 A part of the directly and indirectly related industry of MFT

The fourth point in Porter's diamond: the domestic rivalry of firms and the conditions governing how companies are created organized and managed also greatly influence the development of competitive MFT industry (Porter 1990: 107). MFT companies are small-scale and family-operated companies, and many decisions and marketing are made by family members. Thus it needs governments' support and cooperation to help boost it to an internationally competitive status. At the same time, these small-scale companies can easily adjust its firm scale according to the demand. Moreover, domestic competition plays an important role in MFT competitive advantage, because intense domestic competition eventually force domestic enterprises to develop an internationally competitive industry and hence able to face and compete in the global markets, and finally enhance their competitiveness and succeed in global competition. The study also looked at how the factors discussed above influence the development of competitive MFT.

Another two additional variables are chance events and government, which can influence any of the four major determinants (ibid: 107). Chance events, which cannot be fully controlled by human being, may suddenly alter the playing field; introduce opportunities for some and threats for others. These chance events can be looked at in terms of unforeseen contingences which are beyond the control of people. Significantly,

natural disasters such as typhoon, tsunamis, floods, or volcanic eruption can alter and destroy the available resources for the development of MFT industry or on which MFT industry thrives. In fact, Wenzhou area is affected by typhoon yearly in Jun and July. How MFT reacts to these chance events and how operators the government deal with drawbacks, take a good opportunity or bring a threat, can be critically important in determining the development of competitive MFT industry.

The management and legislations from government are also vital to the industrial competition and resource uses. In MFT, the overuse of fish stock, the environment disruption and the lack of waste management can create sudden discontinuities in the pattern of tourist flows. It can also result in degradation of resources with implication for sustainability and future development and use of resources.

2.4 Summery

This study use Porter's diamond model to study what factors may contribute to internationally competitiveness in MFT development in the two territories, and not to compete the Wenzhou MFT and North Cape MF. In this study, I use Porter's diamond model to analyze what factors can enhance the MFT competitiveness or reduce MFT competitiveness.

Porter argued that the four determinants and other two factors government and chance are main factors that contribute to the competitiveness of industry development (Porter, 1990: 71). First, the factor conditions are the nation's factors of production, including natural resources and created factors, such as infrastructure and skilled labor. (ibid: 71-124) The created resource and sustainable resource use would receive more attention in my study. Secondly, demand conditions are the nature of home demand for products or services and the degree of sophistication of buyers. The demand of marine recreational fishing industry in local area is examined. Thirdly, related and supporting

industries: the presence or absence of supplier and related industries that, themselves, are internationally competitive are among other important factors which could affect the development of competitive MFT industry. The correlation between MFT and other related industry will be discussed for their direct and indirect relationships. Fourthly, firm strategy, structure and the domestic rivalry of firms and the conditions governing how companies are created, organized and managed have also been looked at as among the factors that influence the development of competitive MFT industry(ibid: 71-124). The study mainly stresses the investments, marketing strategies of the MFT companies and relationships between companies. As Porter noted however, strengths in other parts of the diamond may overcome factor disadvantages (ibid.).

My assumption is that MFT is not internationally competitive in Wenzhou area, because it is not a part of Chinese culture. However, Norway is internationally competitive in MFT. My research studies firstly what are the main factors that influenced a successful development of internationally competitive MFT in Norway a successful development of FFT in Wenzhou. Secondly, the Chinese culture does not have the marine recreational fishing culture, but with the improvement of per capita income in Wenzhou, I study whether people in Wenzhou develop MFT in the same way following European MFT model in the future.

As was mentioned above, these factors in Porter's diamond model directly and indirectly effect the marine fishing tourism development, thus influence its international competitiveness. Porter's diamond models bring these important factors together, and explained these in a useful manner. By using the explanatory theory of Porter, I can better to analyze my research question.

Chapter three

3. Methodology

MFT can be well-developed in Norway, but has not been well-established in Wenzhou. This paper use Porter's diamond model to compare the development of internationally competitive MFT among the two countries and areas, and to find the approaches to develop a successful MFT especially in the Wenzhou area of China.

3.1 Qualitative method

Qualitative method is more suitable for this study to analysis the research question. Therefore qualitative method is a better way to analyze the competitiveness of MFT.

Comparison is one of the most important methods to use in this project. This project also uses methods of observation, speaking to people, collecting statistics, taking photos and conducting interviews. Only qualitative methods are applied in this project. Before going for my fieldtrip, I studied government regulation and management cases in marine fishing tourism in Norway and search the literature for methods to develop the industry in Wenzhou.

Through field investigation was very important; reviewing literatures was useful in learning more about what consist of successful MFT and what arouse MFT demand and the contribution of MFT for local communities as well. I did face-to-face interview to learn the different value of MFT for anglers, operators, and government. In addition, I learn about management regularities and services, in MFT and FFT development in the Wenzhou area and Norway. I gained a deeper understanding of MFT and more detailed knowledge of local resources by conducting semi-structured interviews (the form of interviewing has some degree of predetermined order, but still ensures flexibility in the way issues are addressed by the informant (Dunn et al., 2005: 80) with local

government and tourist anglers, operators, local people and gain insights into policy in fishing tourism in these different territories.

After the fieldtrip, I analyzed the developing process of MFT, summarized the above to understand the reason why this industry could be successfully or unsuccessfully developed and what factor the development of competitive MFT, and also the relatively successful and unsuccessful government interventions.

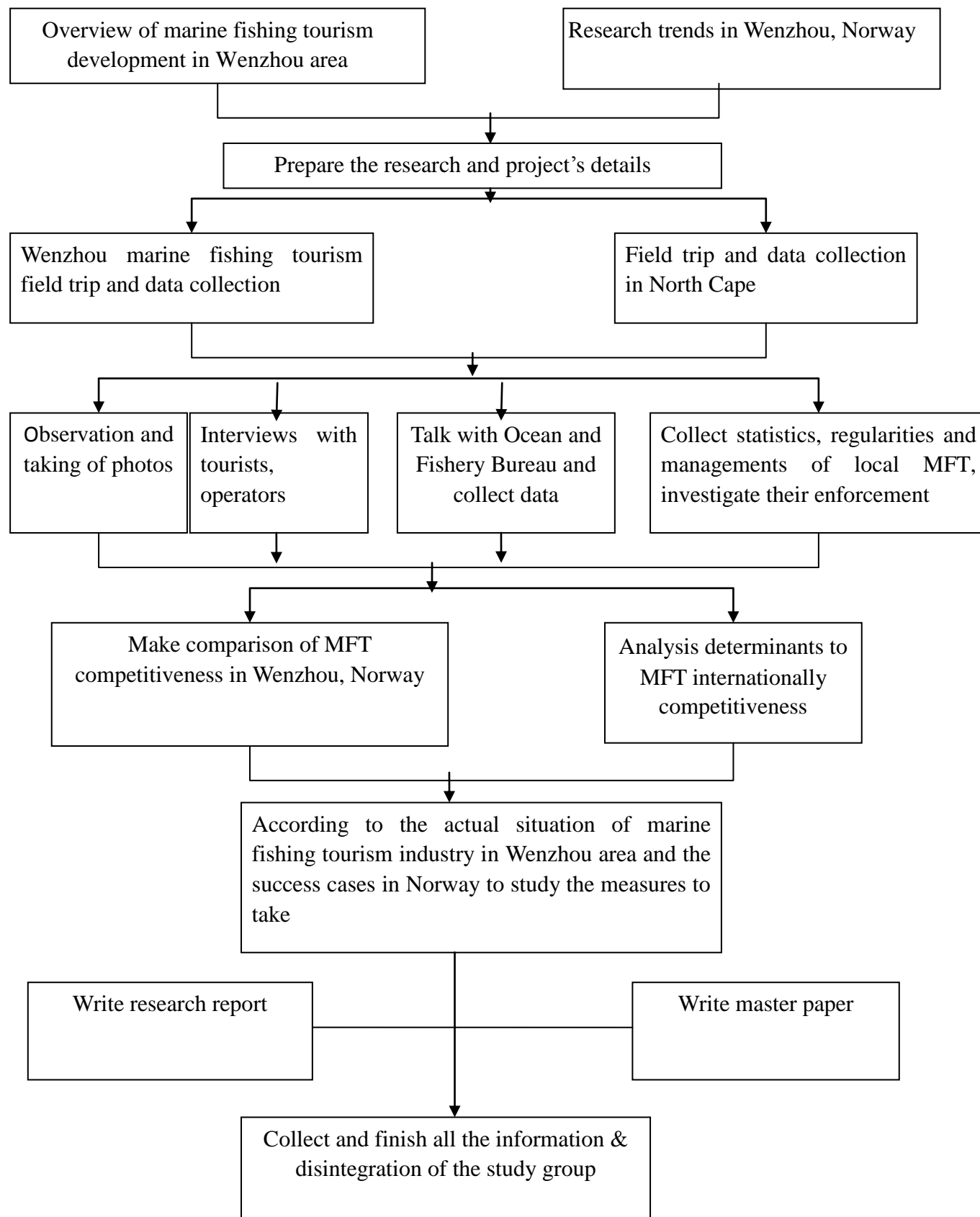


Figure 3.1 The main working process of my study

3.2 Sample selection

This project selected two countries and areas: Norway and Wenzhou. In Norway, I choose North Cape, a place with unique north fishing culture, to study MFT. I went on a field trip to North Cape from May1st to 5th May 2011. There are 7 MFT companies, 5 of them shown in the figure 3.2. Because the other 2 operators I interviewed, their working place is not nearby their fishing camps, so it was difficult locating their precise sites.



Figure3.2 Fishing Camps location of the interviewed MFT companies in North Cape

In Wenzhou area, there is no well developed MFT company, marine fishing activities is active in the sea around Dongtou Island, and Beiji Islands and Nanji Island. I contact anglers via internet, I also chose Dongtou County to study FFT.

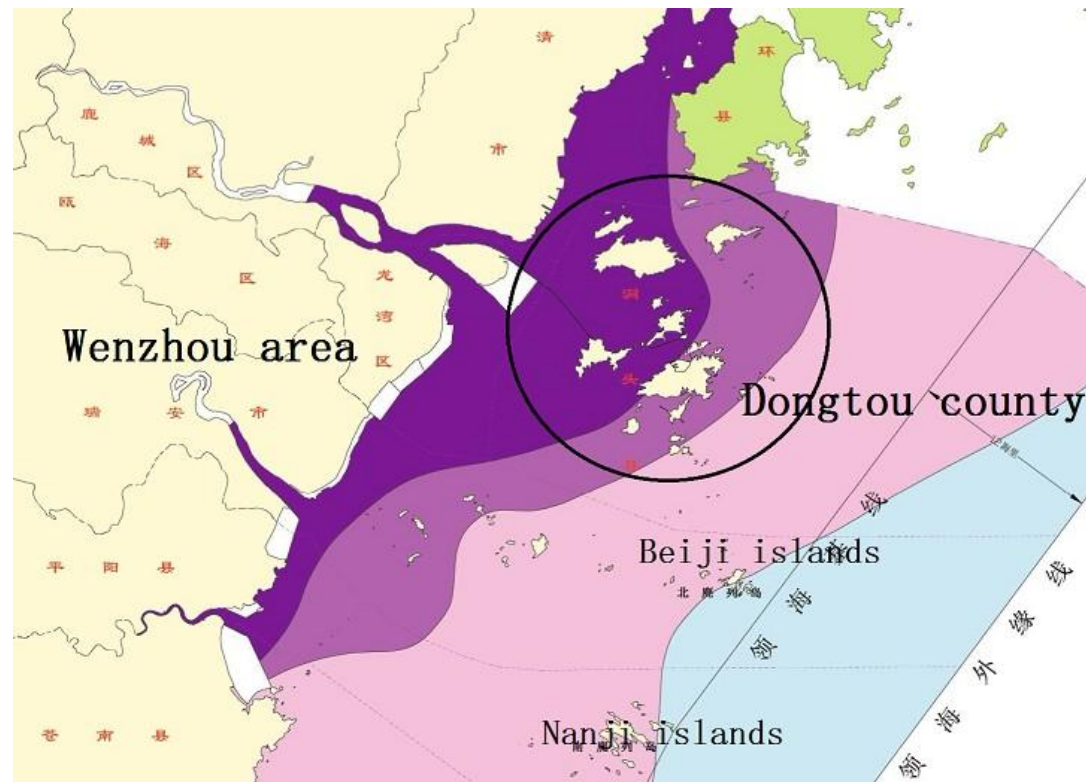


Figure 3.4 FFT in Dongtou County in Wenzhou

3.3 Data collection

Primary data and secondary data were collected in this project, including qualitative and quantitative data. Semi-structure interview, questionnaire survey, participant observations are the main way that I collected primary data.

3.3.1 Case studies

Case studies are defined as a “strategy of research that aims to understand social phenomena within a single or small number of naturally occurring settings” (Bloor et al., 2006: 27). Stake (2006: 45-103) identified three types of case studies. The intrinsic case study; which is a case of interest for the researcher, the instrumental case study; which provides insight into an issue or draw a generalisation and the multiple case

studies; when a number of cases are studied in order to investigate a general phenomenon (ibid.). I used instrumental case study in my research to get insight into the MFT development in Norway and Wenzhou. I used the instrumental case study to have understanding of the North Cape and Wenzhou MFT development. The cases studies explored how MFT was established and how it has become well-developed in North Cape, and what factors helped or hampered its development.

3.3.2 Interviews

Interviews enabled me to gain an understanding of the role of operators in the MFT industry (Hardesty 1994; Porta and Keating 2008). I used various interview methods included interview guide, questionnaire survey, and informal conversation. Talking to people was an excellent way of gathering information about the development of MFT. The interview guide was used in my study to interview key informants, for instance, officials in fishery board and MFT operators, while the questionnaire interviews and informal conversations were used to interview the tourist anglers.

3.3.3 Participant observation

Participant observation is one of the most proper and direct ways to obtain the data. Participant observation was defined by Bryman as involving the engagement of the observer (researcher), in the social setting they want to observe. Participant observation could also bring out the understanding people attribute to their environment and behavior (Bryman 2008: 256). Barbour (2008: 17) also noted that observation enables the researcher to see events occurring in their natural environment. Recreational marine fishing's consumption value is created by consuming tourism experiences, depending not only upon the objective experience but also upon the tourist and the tourist's state of mind at that particular moment. Participant observation ascribes me to be an international marine fishing tourist, and I learned a lot from the fishing activity as my personal experience, which can hardly learn from secondary data. At the same time, I

interviewed anglers (fishing tourists) and skippers (boat drivers) when I go fishing with them and conduct the face-to-face questionnaire survey in Wenzhou.



Plate 1: Anglers fishing in Dongtou Island

In Wenzhou, due to dispersed anglers, I used internet to do group discussion (by using QQ software which most of Chinese people who go fishing usually use to contact with each other) and questionnaire survey among anglers, (questionnaire is attachment 2). Order to facilitate the statistics, I selected 80 (regular anglers) to do questionnaire survey (attachment 2) and 64 of their answers are available, and the other 6 angler respondents are tourist anglers from other surrounding area: Ningbo city, Fujian province and Taizhou area. Then, I do participant observation: went marine fishing with anglers in Dongtou. Some questions are personal information, for instance, the anglers' personal income level or MFT operators' annual incomes are mainly dependent on their integrity, thus sometimes have to be reflected and estimated from other relative question since some of them could provide false information.

In order to investigate FFT, I did semi-structured interview with the mayor in Dongping town (attachment 5). There I got important detail data about how FFT is managed by governments, some new bylaws, new marketing-strategies and new planning for its future development as well. And I also experienced FFT and did participant observation in Dongtou Island, and interviewed five operators (attachment 5) and talk with tourists.

In Norway, first I visited National Commercial fishery director in Bergen. I did semi-structured interview with officials there to know the present situation of MFT development and national regulations and government's attitude to MFT development. Secondly, I did fieldtrip to North Cape for five days. There I interviewed officials in tourism department, commercial fishery manager in local municipality (attachment 3). I also interviewed seven MFT operators (attachment 4) to know their management methods and marketing strategies and other details. In addition, I did short time questionnaire survey for 25 tourists there (attachment 1). The MFT operators' fishing camp is shown in the figure 6. The identity of the people I interviewed is list as below.

Table 3.1 Interviewees and questionnaire survey time in North Cape

Interview time	Position
2 nd May	Marine fishery manager
2 nd May	leader administrations in innovation policy
3 rd May	Manager in tourism in NC.
3 rd May	Move to fishing villages Gjesvær and skarsvåg to interview MFT Operators, questionnaire survey for tourists was conducted at the same time
4 th May	Interviewed MFT operators in Honningsvåg , questionnaire survey for tourists was conducted at the same time

3.4 Data analysis

The data analysis did not start until the questionnaires and interviews were finished in the two fieldtrip. The data of internet questionnaire survey was analyzed after all the other data were collected.

The questions for semi-structure interviews among operators changed according to their answer. For example, the previous interviewee's answer may tell what is the most importance question. So I will ask next interviewee for more information to know more among this question.

Finally, I summarize and analyses what I learn from these data in the two counties and areas, then make comparison to explore the determinants why MFT is internationally competitive and well developed and regulated in Norway, study the legislation and management of marine fishing tourism in the area, identify the vital causes, find the proper way to attract people to this sport and make recommendations and plans to develop marine fishing tourism for the Government in Wenzhou.

3.5 Validity and reliability of the data

3.5.1 Validity

The source of secondary data is from reliable public government documents or reliable government documents given by officials during my fieldtrip.

The sources of primary data are derived from questionnaires and some questions in my interview.

The questions, were designed on the basis of former scholars' research study, reflect the considered important factors of internationally competitive MFT. The questions in questionnaires and interviews are aimed at factor condition, demand condition, firm

strategy, related and supporting industries chance and government, and all of these aspects are considered very important according to Porter's diamond model. Therefore, these factors, to a great extent, measure how these factors affect on MFT international competitiveness, which leads to successful or unsuccessful MFT industry in Norway and Wenzhou. Furthermore, there is some opening questions are designed in addition to questionnaire during interview process. These have helped to improve the validity of the data.

3.5.2 Reliability of data

The data is collected by face to face interview during field work. In order to catch the completely information from interviewees, I used mp3 to record some conversations.

When I do interview and questionnaire survey, I remind informants and interviewees that the information is collected for a study for master degree, and not for commercial purpose. This ensures the interviewee and informants provide relatively reliable data. This could affect the validity and reliability of the data, because in North Cape, most anglers are German, my German classmates translate my questionnaire to Germany. And in North Cape fieldtrip, my partner is Norwegian and he helped me as interpreter. Wenzhou area is Chinese speaking countries, thus there is no language problem.

Chapter four

4. Comparison of development of Competitive MFT, between Norway and Wenzhou

4.1 The development of MFT in Norway

4.1.1 MFT in North Cape

Marine fishing tourism first started around 1989. It started in North Cape because of the demand of tourists. In the beginning MFT business Operators started it because their own hobby of going for marine fishing. Tourists wanted to see more of North Cape and they asked fishermen to take them out in their boats and also to put them up in their homes. Tourism, hostels, harbors, and fish stocks are well-managed, and attract many MF tourists to North Cape. Thus the start of marine fishing tourism was no accident. There are about 20 boats especially for MFT, but the number of boats available for tourists is larger because professional fishermen take MF tourists out with them (fieldtrip, interview).

4.1.2 MFT Factor conditions in North Cape, Norway

Good scenery and abundant fish stock are important inherited factor conditions for the start of MFT in North Cape. Later on, unique fishing culture, regulation and policy are the creative factors promoting MFT in its investments and innovation. Besides, parts of these created factors are based on the related industry-commercial fishery and tourism, which is also depending on the resource advantages in this place.

Inherently superior geographical environment is good for the start of MFT. North Cape has a long history as a destination for travelers and the nature attractions in North Cape are unparalleled. There are mountains plunging into the sea from hundreds of meters,

fjords, tall mountain peaks, northern lights and midnight sun (Visit Norway, 2010). In North Cape, good scenery in coastal areas is important to fishing tourists. Tourists like fishing under the midnight sun in summer (field trip questionnaire survey). But the long winter has also hindered the development of MFT (interviews with North Cape operators).

With long fishing history, North Cape is an important fishing field, a well-known tourist attraction and a well developed fishing place for tourists. On the one hand, the well-developed fisheries provide innovation, management methods and qualified personnel. On the other hand, well-developed tourism ensures a good service for MFT tourists. In addition, good SME financing policy in Norway (Innovation Norway Bank) provides investment capital to the MFT industry. In other words, local culture and regulations (policy) is promoter of MFT in innovation and investments.

4.1.3 Demand conditions North Cape, Norway

First, long European fishing culture generated large international demand for North Cape MFT. Second, marine fishing is an important Norwegian identity, thus MFT prevails in domestic Norway. Thirdly, the unique North recreational marine fishing culture, attract MF tourists from other countries. In North Cape, more than half of MFT tourists are German aged from 30-70, other tourists are from Eastern European country (fieldwork in North Cape). Across Europe, the number of anglers in Eastern European countries generally are showing lower rates than Nordic countries higher ones (Phil Hickley, 2009: 139).

It was told by the first operator I interviewed, “many of his customers are old people from Germany, who have a lot of money and time. Now the number of my customers is growing yearly and I am not worry about my market”. In fact, a large part of MFT tourists need to have a lot of time and money, or their time is more flexible, because

they should have time and money to travel and spend in marine fishing. For example, in a National Survey of Water-Based Leisure Activities in Ireland, the sea anglers' social classes are mainly self-employed people and professionals or managers (A National Survey of Water-Based Leisure Activities in Ireland 2003: 31).

Tourists are certainly from other area or other country, but the development of MFT is closely related to the indigenes' marine fishing activities. For example, in Norway a part of Norwegian MFT market is self-sufficient because a lot of people go fishing by themselves, but a large part of demand depends on market. The MFT in North Cape though is not depending on the domestic market, and seldom Norwegian pay for marine fishing as tourist there. But this can be seen as the result of domestic interior competition, because people can easy go fishing in other sites nearby. In fact, MFT in North Cape receive enough tourists from other country and they do not need direct support from domestic market. In all, when MFT is well-developed, domestic demand is a strong support to MFT.

Sport fishermen in the North European countries demonstrate a high consumer surplus (i.e. willingness to pay more than the market price (Toivonen et al., 2004: 1-10). Large Swedish corporations came to Sørøya and bought up large plants and dropped prices. My recommendation is for legislation to ban their fishing altogether or charge foreign companies for their use of fish resources. The government could also charge them for the access of tourism. It could therefore increase the cost to these foreign companies and boost the price of MF, thus protecting the interests of local MFT in North Cape.

In North Cape, the operators all describe the relationship between them as primarily cooperative rather than competitive. Every operator sent their customers to other operators when they do not have enough capacity to cater for tourists' demands. But, in my opinion, it does not mean they cooperate directly with each other. It only suggests that, in North Cape, the competitive pressure among the MFT firms is not strong to take each other's market shares. Though Porter argued that direct cooperation among

competitors may eliminate diversify, slow the rate of industry improvement (Porter, 1990: 122). Based on the current situation of MFT development in North Cape, this action of operators can rather accelerate than slow the rate of MFT industry improvement. For one thing, in so doing, the industry can win more customers. Furthermore, in North Cape, operators' idea (innovations) to further product differentiation is not only a result of internal rivalry among the firms, but also to create larger demand for themselves in future.

4.1.4 Related and supporting industries North Cape

Commercial fishing industry, which are also competitive for its fish stock are supporting MFT. Thus, both MFT and its related industry-commercial fishery depend on nature resource. The commercial fishery and special nature geography condition created unique north MFT culture. In addition, some MFT operators cooperate with local inland angling firms to deal with seasonality.

The local coast long fishing history is also important reasons why MFT develop in North Cape. North Cape is one of Norway's most important fishing municipalities. The fishing industry has been the main occupation for more than a thousand years (North Cape, 2010). There are five fish factories, 175 fishermen, and 189 boats. Fishing boats, docks, other large boats such as the fishing patrol boats of the Norwegian Coastal Administration are elements of the coastal scenery. Gjesvær and Skarsvåg are two of its main northern Norwegian fishing villages. Skarsvåg is the world's northernmost fishing village (Skarsvag.North Cape, 2010). The cod is taken ashore here and delivered to the local fish factory is considered to make the best salted fish in the world. Known as a trading post and fish station, Gjesvær was one of the largest and richest fishing villages in Finnmark. The fishermen themselves are also tourist attractions, with people wanting to visit fishing villages where they can see fishermen mending their gear or landing their catch (Kurlansky, 1997 in Øystein Normann, 2007: 241). Cabins and restaurants, decorated with a variety of artifacts made of driftwood and symbols of the fishing

industry, preserve the culture of the north Norwegian coast. The unique North Norway tradition of drying stockfish in the sun and wind on wooden racks in drying houses or outside beside cabins in the villages also attracts tourists.

Therefore, knowledge in MFT is available for people in North Cape because of the local culture. People are familiar with sea and they work in boats for instance people who work in Norwegian Coastal Administration. Hotel managements is also easy for people because long tourism industry in North Cape.

4.1.5 Firm strategy in North Cape

Knowledge and innovations in MFT is available for people in North Cape because of its local culture. In North Cape, MFT operators are workers in professional fisheries and the Norwegian Coastal Administration, officials in local tourism organizations and hotel managers. They help each other rather than compete with each other because the resources are abundant. Therefore, no job training such as navigation or hotel management was needed for MFT. Some operators are also fishing enthusiasts and fishing skills are handed down. There is often a correlation with the special interest of enthusiasts who develop their hobby into a tourism business venture (Novelli, 2005; Øystein Normann, 2007: 242). MFT started in North Cape as a hobby and is still a family-run business. Fishing is central to MFT and tourists are housed in fishermen's cabins.

At first, MFT operators offered boats for rent and modest accommodation, and then they began to offer catering and other facilities. They improved their service and work by learning and doing and they also have knowledge of management services and marketing strategy through communicating with tourists directly. In North Cape, the MFT operators send tourists to each other when they do not have enough capacity and thus they share their market to some extent. Innovation and knowledge are also shared and transmitted immediately by MFT operators in North Cape.

Currently MFT has an abundant market and most operators say their capacity is too small and they want to enlarge their business. MFT operators use a direct marketing strategy because their customers are fishing-activity-leading tourists who have a lot of time and money, so only direct marketing is effective to MFT. The Direct Marketing, on and off line, is a highly successful and cost-effective way to bring attractive holiday messages and travel offers to the attention of selected audiences (MFT enthusiasts) overseas who have a proven capacity to respond. In North Cape, more than half of MFT tourists are Germans aged 30 to 70; other tourists are from Eastern European countries. MFT operators cooperate with German tourism firms directly and thus they reject cooperation with Nordkapp Reiseliv (local tourism organization). Cooperation between MFT operators and Chinese tourism agencies is currently ongoing. Nordkapp Reiseliv (local tourism organization), however, has a large number of tourists and strong marketing skills, and they focus first and foremost on 'selling' North Cape. MFT operators need to cooperate with Nordkapp Reiseliv (local tourism organization) if they can bring MF tourists to them.

MFT operators hold Festivals by themselves which can stimulate the demand from international market. In Repvåg, Nordatlantik-tours arrange a Halibut Festival in the first week in June, and the festival is now in its sixth year and is a big success. They use the words of "45 contestants catch about 6-8000 halibuts in one week" to absorb customer. Angler- tourists who want to have the big catch opportunity have to stay in Repvåg fjordhotel (one of MFT business). Nordatlantik-tours told me they also arrange the Catfish Festival in Repvåg during the first week in June. Though this activity strongly depends on fish resource, it can enhance MFT directly because the big catch of halibut can attract tourists to come.

Though until now, the products they offered to the tourists are quite limited, imitation is an important way to develop their business. All six firms offer accommodation and boat hire. Only the two long-established firms offer guiding and prepared food in a

restaurant for their clients. One operator offer inland fishing to deal with seasonality. Another one offers small scale bird safari and whale safari. The internal relationships, among the different operators in the North Cape MFT have been an important source of innovation. Three out of five informants claimed that they knew about other operators in the municipality when they established their firms, though they claimed that they had not been affected by them, but imitation is very easy in this small area as explained as follow. Only the last established operator told me, “I have learned from them, so now I know what I am doing, or at least I think I know what I am doing”.

But the other three operators told me that “He (the first-established MFT operator in North Cape) affected me in the way that he was more or less the sole reason why I established this business. He knew I had an apartment and a boat available and wondered if I was interested in letting it out on hire to some tourists.” The owners of these MFT firms have different strengths, because they have different professions related with MFT, such as sea man, official in local tourism management department and hotel managers. They are also easy to imitate others in a simple visibly way: their firms are geographically concentrated in a single region, thus they can meet or visit each other, talk to others’ customers, see others’ webpage and so on. Therefore, establishment of new firms is based on imitation rather than innovation.

Since there is not aggressive competition or rivalry that lead to product innovation and differentiation, operators’ idea for further product differentiation is more to create larger demand for themselves in future than a result of internal rivalry among the firms. Thus, the imitation improved the rate of the MFT development and also enhanced its industrial competitive advantage. In other words, right now, the “cooperation between operators” (send their customers to others when they do not have enough capacity) may not hamper the MFT industry’s upgrading in the way of reducing their rivals’ pressures to innovation, but benefit each other. On contrary, it benefited every MFT firm and enhanced the efficiency of MFT to meet the quality of demand.

Learning from tourists is another good way to enhance their business, create more demand and get more knowledge. The second early established firm told me that “the dishes I serve in the restaurant are made of local raw materials and developed in cooperation with my tourists, based on their taste.”

4.1.6 Government Policies and regulations in North Cape, Norway

Right now, the supportive attitude from government is a good opportunity for the MFT development in North Cape. The government and chance can affect other four determinates. The government regulates the natural resource use and other factor condition directly, and they can also do marketing to enhance demands condition.

Government restrictions on MFT are adjusted depending on the use of fish and its availability.

First, I review regulations in previous years.

Before 2004, for rod fishing in Norway there was no regulations concerning minimum size, bag limits, and fishing stop periods, or no-take zones. The country’s commercial fishermen then demanded regulation of marine fishing tourism because the activity arguably results in the decimation of fish stocks. Other participants in the discourse on marine fishing tourism maintain that fishing tourists, using a fishing rod, cannot possibly decimate fish stocks (Borch, 2004: 49-57). Norway, however, takes measures to protect species in decline (ibid.). The most popular species among fishing tourists visiting Norway are cod, halibut, catfish, haddock, coalfish (saithe), pollack, and European ling. In certain areas on the west coast of Norway and in the north (Saltstraumen) it has been indicated that stocks of catfish have been decimated as a result of tourist fishing (ibid.). There seem, however, to be greater challenges as regards stocks of coastal cod (ibid.). The research team that performed a 2001 survey was more

worried about the effects from marine fishing tourism on stocks of coastal cod than any other species targeted by tourists (Borch, 2004: 49-57). Researchers on coastal cod have found genetic variations in the cod population in the same area (Pogson and Fevolden, 2003; Borch, 2004: 49-57). Coastal cod are vulnerable to extensive recreational fishing. As a result of the decline in recent years in coastal cod stocks, the Norwegian Institute of Marine Research, on advice from the International Council for the Exploration of the Sea (ICES), has suggested a complete ban on commercial fishing of stationary coastal cod in Norway. In an attempt to reduce the amount of coastal cod caught by foreign fishing tourists the Norwegian government in 2003 suggested a limit on the weight of fish visitors could take out of the country. The suggested export limit was 20kg. In 2002 the Norwegian government suggested a minimum size as a way of regulating tourist catches. After rounds of public inquiry, however, the government decided not to impose a legal maximum on recreational fishing. One of the reasons for this decision was that Norwegian legislation prohibits the release of dead or dying fish. The probability of fish dying after being released is greater for sea fishing than for freshwater and river fishing. This is because of the physiology of the fish and the depth of the water where the fish are caught. Research on hooked fish (long-line) performed by the Norwegian Institute of Marine Research (personal communication) indicates that cod rarely survive being released because of the inflation of their swimming bladder (Borch, 2004: 49-57). On 1 June 2006, the Norwegian Ministry of Fisheries and Coastal Affairs introduced an export quota for fish and fish products. The quota limits the volume of marine fish or fish products from sport fishing that may be exported from Norway to 15 kg of fish fillets per person.

Second, I trace the development of MFT in Norway and the national restrictions.

Tourist fishing has become an important part of the Norwegian travel and tourism market. The Directorate of Fisheries has no exact figures for the number of tourists who fish in the sea, but the report 'Fish as bait-fishing by foreign tourists in Norway' in 2001 estimated that around 22400 tourists engaged in sea fishing in Norway in 2000. The

total catch was calculated at between 12000 and 15000 tons of fish. Another report points out the uncertainties attached to these calculations and puts the total tourist catch at between 6000 and 9000 tons each year. Projects are under way to examine the scope and effects of tourist fishing in greater detail, in relation to both the resource and the value creation (official site of the Norwegian fisheries, 2010). The research institution Havforsknings Instituttet says that neither coastal cod nor other types of fish are threatened by organised fishing tourism. In 2009, 3335 tons of fish, much less than the estimates from ten years ago of 12000 to 15000 tonnes (Radio Nordkapp, 2010), were caught.

The export quota, fishing gear limit and minimum size regulations were established in 2006, in order to change people's attitude and raise marine fishing tourism operators' and tourists' awareness of the legitimate use of fishing resources. The Ministry of Fisheries and Coastal Affairs wanted to find a balance between sensible use of fish resources and enhancing fishing tourism in Norway (interview with fishery official in Bergen).

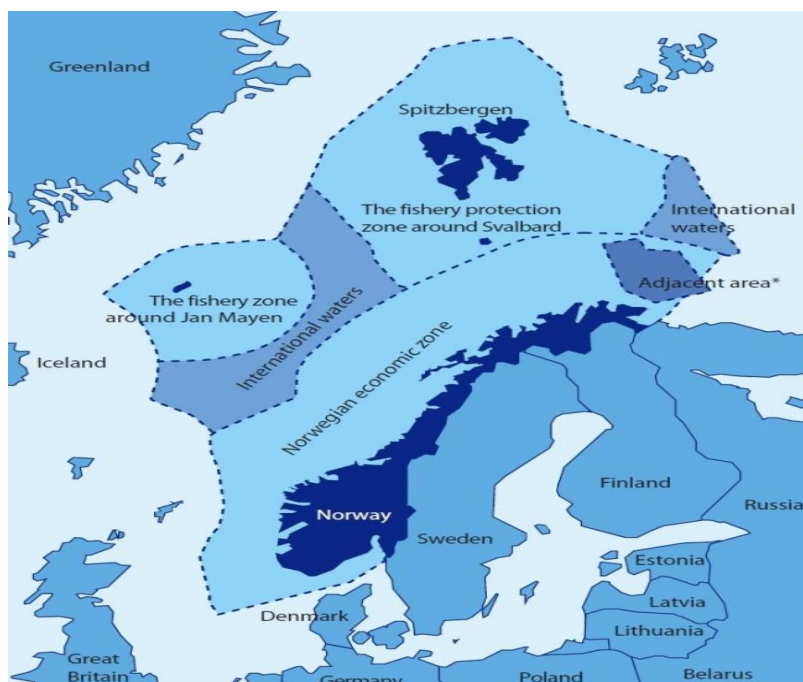


Figure 4.1 Norwegian economic zone

Marine fishing is a big part of Norwegian identity. Norwegian people were formerly allowed to take a lot of fish without any regulations being imposed. Increasing pressure on local fish resources in the Norwegian economic zone (as shown in the figure 4.1 above), however, meant that in 2006 the Marine Fishery Board (Fiskeridirektoratet) had to apply two sets of regulations on recreational fishing. One set of regulations is for Norwegian recreational fishermen (permanent address in Norway/resident's permit), and the other set of regulations is for foreign visitors. They are as follows:

Fishing gear: tourists can only use hand-held gear (line, trolling line or rod) but not to sell their catch. Foreign nationals not permanently resident in Norway are permitted to engage in sport fishing using hand-held gear (line, trolling line or rod) but not to sell their catch. Minimum size: the fishing authorities request individual tourists to comply with the same minimum fish size rules which apply to professional fishermen, except for saithe and mackerel.

Export quota for fish and fish products: no more than 15 kg of fish filets or fish products can be exported from Norway per person. The export quota applies to catch from sport fishing in Norwegian territorial waters. .

Minimum size (see Table 4.4)

Examples of the species professional fishermen are allowed to sell are shown below along with minimum sizes.

Table 4.1 Minimum size limit in Norway 2006

Species	Area	Minimum size
Halibut	Entire country	80 cm
Cod	South of 62 °N	40 cm
	North of 62 °N	44 cm
Haddock	South of 62 °N	31 cm
	North of 62 °N	40 cm
Plaice	West of Lindesnes	29 cm
	East of Lindesnes	27 cm
Sea trout, arctic char and salmon		35 cm
	Exceptions: Nordland, Troms and Finnmark (applies to sea trout and arctic char only)	30 cm

The length of the fish is measured from the tip of snout to the extremities of the tail (official site of the Norwegian fisheries, 2006). Though national government give these restrictions on MFT, government still want to enhance MFT in Norway because MFT can create employment and economic beneficial to local people. While employment in the traditional fisheries is falling through increased efficiency, a stronger focus on travel and tourism will contribute to diversity in terms of employment and the general development of coastal communities (Fiskeridirektoratet, 2010).

Thirdly, this fieldtrip also investigated the implementation of the regulations in MFT, which is an important part of MFT development in term of production factors and other determinants. I shall identify the implementation of regulations on MFT in North Cape. All the 6 operators agreed with the fact that: it is easy to comply with the minimum size because of the abundant fish stock. Tourists still can use lots of fishing gears, thus the minimum size and fishing gear do not influence fishing tourists. In fact, MFT is not seriously regulated separately in North Cape. The only enforced regulation in North Cape is the 15 kg export quota. The check and fine in the airport can effectively stop people from taking hundreds of kilogram of fish abroad, and this is a successful restriction on MFT in North Cape.

At present, 15kg export quota has not decline the number of tourists dramatically. Because “In the beginning the 15kg quota may scare away some potential customers, but the ones that visited and were pleased with the experience came back, even though they heard about the new regulation”(interview with the MFT operator, and all of 6 operators agree with it). In fact, The Ministry of Fisheries and Coastal Affairs give this quota because its implementation requires a low cost, and it can stop tourists’ free use of fish resource. Though tourists want a bigger quota around 30-40kg, they are satisfied with the marine fishing. The fish resource is abundant and catch in North Cape is easy for tourists. Thus, tourists will still fish a large quantity of fish that they cannot consume in Norway. For instance, in Halibut Festival, 45 contestants catch about 6-8000 halibuts in one week (North Cape, 2010). However they are not allowed to sell their fish in Norway. Limits on the number of fish retained by an individual angler (bag limit) or boat (boat limit) are possible for recreational fishing (Mcphee et al., 2002: 45). I suggest that the local marine fishery board should regulate the fish retained by tourists or suggest tourists keep fish fresh and give their redundant fish (that they cannot consume) to local professional fisher men as a gift. Meanwhile, it can also decrease the conflicts between MFT and professional fishing.

Another important restriction from The Ministry of Fisheries and Coastal Affairs is the implication of king crab quota. It was published in March in 2010 that, tourists are not permitted to take part directly in catching king crab but a certain quota has been allocated to the tourist fishing industry in Finnmark (directorate of fisheries, 2010).

In North Cape, few MFT operators apply for Red king crab quota. MFT operator said “it is totally free fishing in this area, extinction fishing. We should use that resource, let the tourists get the crab and let them eat as much as they want. That is to the benefit of all! There should be no need to apply for a tourist quota for crab fishing, as you need on the inside”. Officials in North Cape fishery department said nothing will be happen if MF tourists fish more than the quota that MFT companies applied because they will not check how much king crab they really catch.

Fourthly, it was suggested that fishing tourists' boats must keep a distance of more than 100 meters from the closest fish farm when fishing. All boat traffic shall keep a distance of at least 20 metres from fish farms and moorings for fish farms (directorate of fisheries, 2010). This legislation is to decline the conflicts between commercial fishery and MFT industry, and it is easy to comply because space is large. The conflicts between professional fisher men and MFT declined because firstly there are fewer people and more space available in North Cape. Secondly, in Norway, fish resource belongs to the whole society and professional fisher men understand MFT can also use the fish resource. The last but not least, MFT operators send tourists to professional fishermen and professional fishermen receive income from MFT.

Moreover, investments from government can increase the production factors, and also satisfy the market demand, and then promote the MFT. Government plays an important role in regulating as well as investments for MFT operators who do not have startup capital. All of MFT operators applied for money from local municipality and 'Innovation Norway' and which is a grant to them and now they have to apply loan if they need more capital. At first, MFT was very small business, and had tourists bed at home or started with only 4-6 beds and only one boat (field trip in North Cape). Thus governments' investments are important for its start and growing process.

Because of the unique appeal of local culture, and good management of tourist resources, MFT is flourishing at present in North Cape. The local government is preparing a plan for "sustainable tourism" in order to manage larger groups of tourists in the future. But the case in North Cape tells that government plays an important role in regulations, investments for MFT operators who do not have start capital. However, the tourism department did not succeed in their marketing.

In light of the theory on the role of government of MFT, my field work revealed that,

the government plays an important role in the economic lives of operators as well as the municipality. In North Cape it is observed from responses by participants that government plays an important role in regulating as well as investments for MFT operators who do not have startup capital. However, there isn't much success in their marketing of MFT. Thus the policy that could be improved at present is mainly on their market strategy and local government should attach more attention to "sustainable tourism" in the future.

It is important to note that, as at now, MFT seems to have little adverse effect on the marine ecology. However, the government has to ensure that, this current trend is maintained. At present, most important thing is to continue to make investments to enlarge MFT in order to attract larger number of tourists to come, MFT in North Cape. Implementation of regulations should continue to take care of fish resource.

4.2 The difficulties of MFT development in Wenzhou

The first unsubstantial factor condition to the development of marine fishing tourism is the poor environment in Wenzhou. The marine environment in the off-shore areas in Wenzhou has been serious polluted, and a large proportion of area is not available to marine fishing (shown in Figure5). Though, in my fieldtrip, fishing enthusiasts said, "polluted water cannot stop them from go fishing", and "the catch is more important". But all of them want more quiet reefs and cleaner comfortable environment and this is the main reason why they visit shores in Fujian province. According my questionnaire, what anglers are considering when they are looking for fishing spots: warm weather in sea, sunlight, temperature, efficient bait, quiet reefs to fishing and so on. Thus, clean sea water and good environment is important factor to MFT development. But the environmental pollution is inevitable to these industrial Wenzhou cities and also for its high population pressure.

Another difficulty is the low fish stock because of the commercial fishery. According to

the interviews to anglers, fish stock is low in Dongtou islands, and big catch is very difficult. So anglers go fishing to Nanji islands (which is a protection area) and Taishan Island (an island in Fujian Province, south of Zhejiang). There is little regulation except those for seasonal limit and fishing tackles, but no specific minimum size limit or strict quota limits in Wenzhou, and the fish stock is under high pressure of consumption demand from large population in the Wenzhou area. Compared with North Cape, Wenzhou is inferior in its resource.



Figure4.2. Pollution sea water in Wenzhou

Thirdly, the main reason lead to poor creative resource and the less domestic demand is that marine fishing is a new sport to Chinese people. Chinese culture do not have these sea-water-based sports such as Sea Angling, Sailing, diving, and China's marine recreational fishery is in the exploratory stage. People are lack of knowledge about the potential of marine fishing tourism is hampering the development of the sector in China. It is important to mention that, a large group of people in the Wenzhou area do not have enough understanding of the culture of marine fishing sports and especially, only few

women go marine fishing. According to statistics from the fishing club organized by the Wenzhou Fishing Association, there are nearly 200 registered members of the Wenzhou fishing club. However, it is estimated that the total number of fishing enthusiasts is more than 1,000 in Wenzhou, which accounting 0.01% of the total population. Wenzhou suffers from typhoons in July and August of every year, so inhabitants are afraid of the sea. Parts of rich Wenzhou people think fishing is a waste of time because they dedicate most of their time to business. However, with the improving standard of life and the growing number of youngsters studying abroad, the number of people who like marine fishing is increasing. The domestic market still needs long-term cultivation. However, marine fishing skill is easy to learn, and large proportion of people know how to fishing learning from friends or colleges in Wenzhou. The number will be easier to grow if people learn angling from friends.

On the other hand, a large proportion of anglers are Dongtou indigene and ordinary workers. About half of anglers' average annual income is under 10000EUR, angling prices per trip vary from 30 to 100EUR (But in North Cape, half of anglers' annual income is around 40000EUR or they are rich old German, and boat rent is at same price). Anglers' personal income in Wenzhou is obviously lower than Norway, and anglers are not easy to afford the high MFT expenditure.

Fourthly, a direct or indirect investment is an important to MFT development in future. Large-scale marine fishing tourism industry needs a heavy financial investment for it to develop. The challenge is that, because marine fishing tourism is not well developed, the benefits are little comparing to the large investments required at first. It is difficult to appeal to large private investment because the high risk of Return of investment. It is important therefore for government to start the initial investment and create an enabling environment for the private sector to join.

The fifth, marine fishing tourism, as part of recreational fishery, has to combine fishing resources, tourism resources and environmental protection to ensure sustainability.

However, there are generally poor environmental management policies in developing countries. In my observation and interviews, Norwegian governments have not do any protection measure to deal with the MFT environmental impacts, because environment quality in their sea is very good. But in order to ensure environmental sustainability in marine fishing tourism in Wenzhou, Wenzhou government should give a series of regularities to protect ecological environments to prevent overfishing, to main marine fishing industry in a sustainable way when it develops to a large scale.

4.3 MFT Competitiveness comparison between Wenzhou and North Cape

4.3.1 Factor conditions comparison

Porter grouped factors into a number of broad categories: human resource, physical resources, knowledge resources, capital resources and infrastructure (Porter, 1990: 74). In Wenzhou have larger number of lower-wage fishermen than North Cape, but they are lack of investments which can be considered as capital resource. Though there is better transportation than North Cape, the Wenzhou area is still weaker in some infrastructure. The Wenzhou area should improve the scenery in dock area and also other facilities.

The natural resource (a part of physical resource) is one of the most significant weaknesses of MFT in Wenzhou, as a direction in developing county. On the one hand, the huge population, the low per capita resource is a congenital problem. Norway's fish production is larger than the need to supply local residents, and large number of fish is export to other countries. However, in Wenzhou, marine fish resource largely relies on fishery artificial breeding which can lead to sea water pollution.



Plate 2: The sea environment in Dongtou.



Plate 3: The Sea environment in North Cape.

On the other hand, the environmental disruption, polluted seawater crippled the environmental attractiveness. In North Cape, MFT is an industry that has low environmental impact, thus there does not need any additional measure to deal with its pollution. But sea water in Wenzhou offshore has been serious polluted. Hence environmental protection department should pay more efforts to deal with sea water pollution and provide a clean comfortable sea area for sea anglers. Moreover, the vacancy of laws and regulations on MFT industry cause confusion in its resources use and industry managements, and cause more waste of resource. In addition, because geographical concentration of MFT, well-developed tourism and commercial fishery in North Cape, some created resources are shared and saved the cost of job training and innovation spending. However, because MFT in Wenzhou is still in the beginning stage, MFT in Wenzhou has not benefited from this.

4.3.2 Demand conditions comparison

In MFT, home demand from local customers is the most sensitive part of their market. MFT cannot easy start in Wenzhou because marine recreational fishing is a new sport to majority Chinese people. Marine fishing is an important Norwegian identity and also an important recreational sport in other European countries. The long history unique

recreational marine fishing culture in North Cape is one main cause of the demand condition difference between Wenzhou and North Cape MFT.

In North Cape and Wenzhou area, I used questionnaire survey to explore the difference between what tourist in North Cape considered good quality MFT and what tourist in Wenzhou considered good quality MFT. In North Cape, total number of informants is 25 (mainly Germany, Wenzhou is 64).

Table 4.2. The good quality of MFT for tourists in North Cape and Wenzhou

	good scenery	Special type of fish	Different types of fish	Big catch	Good service	Cook and Share your fish after fishing,	Good boat and rod	Spend time with particular person
North Cape	60%	96%	60%	4%	67%	80%	68%	4%
Wenzhou	78%	69%	19%	93%	57%	80%	50%	4%

In North Cape, 24 out of 25 informants told me some special types of fish containing coastal cod, halibut and red king crab, are important factors when they talk about good quality of North Cape MFT, and all of the 24 angler informants catch the coastal cod, 20 want to catch halibut, 4 of them want King crab. Thus North Cape has the advantage in the fish resource especially in the special types such as coastal cod. Though they told me the big catch is not easy at that time (the beginning of May), they still enjoy their holiday in North Cape and all the 25 informants noted they are satisfied with marine fishing in North Cape. Also anglers (24 out of 25 informants) like going fishing for the coastal cod. Secondly they (20 out of 25 informants) like cooking and sharing fish. Thirdly, they (15 out of 25 informants) like this quiet clean and beautiful place. 17 out of 25 informants told me the boat and rod is good in North Cape.

The price at which the boats are rented varies from 230 EUR per day shared by 8 people, which equals 28 EUR per person every day, to 100 EUR per day (Boat rent cost

minimum 100 EUR for 7 hour driving the boat alone or 92 EUR shared with 2-3 person). Deep sea fishing is not included in Cabin price. Cabin prices vary from 130 EUR /person/week to 400 EUR / person/week. Deep sea fishing with captain/guide cost 150 EUR for a 2 hour trip. More than half of tourists in North Cape were introduced by friends. 20 of them told me they spend 1200 to 1300 EUR in that trip (3-4 weeks).

In Wenzhou, 52 out of 64 regular anglers told me they go fishing for relaxation, and they do not care so much about how many fish they can catch. In fact, 22 of them told there are not enough fish for them. But there are still good reefs easier to catch fish in small islands in Dongtou such as Hutou Island, Zhuyu Island, Nance Island, and so on. It is very difficult to catch fish in the sea, anglers like to do reef angling because fish are foraging mainly surround these islands. 60 informants told they want “big catch” and this is important and interesting but not easy. 50 out of 64 anglers told they want more clean and comfortable environment for they go fishing with more ease. 10 of them told the Dongtou is not good enough in environment, and they go fishing in Taishan islands (in Fujian province south of Wenzhou) because environment is better there. Other 20 informants told Nanji Islands (a national environmental reserve in Wenzhou, south of Dongtou Islands) is best place for angling. They told that the sea surrounding Dongtou Island is not deep enough in many places and seawater is not very clear. Anglers in Wenzhou mainly do reef fishing, and they need clean quiet reefs and clean sea water to carry out their activities. Anglers told me there are more than 8 good boats in Dongtou islands for recreational angling and they have to book boat before weekends (all the 8 boats will be full in weekend). But there is not well established MFT and there is not service such as gutting room, kitchen, or guide. They live in good hotels in town in Dongtou islands, and there is no fishing camp. 51 informants told me they are very pleased to “cook and share their fish after fishing”, but there is no hotel with access to kitchen facilities for them to take care of their own food preparation. They want better facilities and services. Most anglers take their own rods and fishing tackles to go fishing. Some anglers said “we go sea fishing every weekend; we sleep at home to save money. We get up early at 2:00 in the morning, arrive at 4:00 in Dongtou dock, and then we

start fishing after two hours taking the boat”. The boat rent is around 280 EUR for two day for one boat (around 20 EUR per person per day if shared with 7 people). Good boat can make their trip more convenient and sooner, thus is important. But all of the 64 informants are regular anglers, and they told they are satisfied and very exiting even when sitting by water, no matter the service is go or bad, and the fish is big or small. Other 5 informants are tourists from Taishan Island and Yuhuan Island (north of Wenzhou), they told they went fishing in Dongtou because they know there are more islands and reefs in Dongtou Islands and the distance is very short.

Thus, anglers both in Wenzhou and North Cape are fishing for fun and for food as well. As was told by the second operator I interviewed in North Cape: “we know we must let them (anglers) eat as much fish as they want, and after that they will be satisfied and come back.” Thus, MFT development still strongly relies on the fish resource in the two areas. Due to the cold weather in May in North Cape, the big catch was not easy, but anglers are still satisfied. In the two areas, these are all important to attract tourist to go fishing in a region other than their home place: good scenery in coastal area, some special type of fish, different types of fish, big catch, good service, cook and share your fish after fishing, good boat and rod.

The boat rent in North Cape is not much higher than Wenzhou. The main difference is there are longer stay customers in North Cape, and these customers traveled a long way from Germany. In Wenzhou, anglers are mainly local residents or residents nearby Wenzhou and they go fishing mainly on weekends. As three anglers noted, if the fish resource, the environment and facilities are all improved, the demand condition may be improved and may attract longer-distance-tourists. And then, Wenzhou MFT competitiveness can be improved.

4.3.3 Related and supporting industries comparison

Commercial fishery and tourism themselves, are internationally competitive in North Cape. Some MFT operators are commercial fish processing factory owners. Commercial fishery and tourism are the important factors that promote advanced MFT in North Cape. Innovations, knowledge, managements are learned from these industries. The implementation of MFT regulations is supervised by commercial fishery. MFT has not been well-established thus gain little advantages from its related and supporting industry. Compared with North Cape, there is no specific regulation in MFT in the Wenzhou area. The commercial fishery make low fish stock for MFT anglers.

In addition, there is no size limit, and the mainly strictly enforced regulation is seasonal limit and fishing gears in commercial fishery in Wenzhou area. Regulations in fishing gears can prevent small fish caught by commercial fishers to some extent, but there are still small fish sell in markets. The confusion of the regulation implementation caused the low fish stock. Before the day of season limit arrives, there is fierce "fishing competition": every fisher man wants to catch as much fish as they can. They also use different means to enhance or enlarge their fishing productivity. These factors from commercial fishery lead to that the big catch is very difficult for MFT anglers.

4.3.4 Firm strategy, structure, and rivalry and quality of service comparison

The abundant fish stock in the North Cape fishing field and the large market capacity do not constraint the MFT development, thus MFT operators helped with each other more than compete. The MFT operators use different marketing methods: Some operators receive tourists from their own WebPages; others cooperate with Germany tourism agency. Comparing with North Cape, there is no formal MFT firm in Wenzhou area, and skippers there have not yet begun to explore the international market. Quality of service is also better in North Cape than in Wenzhou



Plate 4: A wooden boat for MFT in Dongtou



Plate 5: Boats in North Cape

4.3.5 Government and Chance comparison

The tension between government, industry and other interests regarding the function of government in relation to tourism is seen in a number of different areas. Five main areas of public sector involvement in tourism may be identified: coordination, planning, legislation and regulation, entrepreneurship, and stimulation (Mill and Morrison 1985; Hall, 1994: 35-55) added another two related functions: a social tourism role and a broader role of interest protection.

In this case of MFT in North Cape, government play role of legislation and regulation, stimulation and government will make a planning including MFT in the future. In the first place, Norway national government is responsible for marine recreational fishing legislation and regulation. Local North Cape municipality's plan will include MFT in the future. However, neither Wenzhou local government nor national government plays the function of legislation, regulation, or planning in Marine fishing tourism. Secondly, until now, both North Cape local government and Wenzhou local government merely provide basic infrastructure such as roads and sewage, and does not play an entrepreneurial role in MFT. Third, according to Mill and Morrison (1985; Hall, 1996:

41), the government can stimulate tourism in three ways: offering financial incentives, sponsoring research and generating tourism demand through marketing, promotion and a visitor service. Currently, North Cape government and Wenzhou government do not sponsor research on MFT. In addition innovation can be easily transmitted from professional fishery, tourism and other industry. Moreover, the government offers a financial incentive by direct investment in North Cape. In the case of MFT in Wenzhou, government is playing role of stimulation. Right now, Wenzhou MFT is lack of investments so they do not own high quality ships and equipments. The yacht-theme hotel for the MFT, invested by Wenzhou government is still under construction. The government did not help with the MFT marketing directly, but held “Marine reef fishing skill competition festival” annually in order to generate tourism demand. Though the number of anglers is increasing, but the low private investment situation has not been changed. The final role that government plays in tourism is that of interest protector, balancing various interests and values in order to meet national, rather than narrow, interests, such as that of a specific industry like tourism (Hall, 1996: 45). My recommendation is that the government should charge foreign tourism companies for the use of MFT resources in order to protect local MFT operators’ interests. In Wenzhou, these islands conducting marine fishing are more underdeveloped than other regions surrounding. So Wenzhou governments can promote MFT to develop the island economy as interest protector.

In North Cape, there is long cold winter from October and anglers are vulnerable to bad cold weather. The tourist anglers usually have to rent some jacket special for anglers when they go fishing in North Cape. In winter, they have to wait until weather become warmer. In Wenzhou from middle of Jun to August, weather is too hot to go fishing in some days. Typhoon will also attack Wenzhou during that time. Thus, protecting from operators and anglers is important to ensure a safe trip. Thus, the bad weather hampers the development of marine fishing tourism both in North Cape and in Wenzhou.

4.4 Advices for the marine fishing tourism further development that Wenzhou can learn from North Cape, Norway

According to the analyses above, MFT in North Cape is overall internationally competitive in its factor conditions, demand condition, related industries, firm strategy and government factors. Some approaches that can improve these determinants are given to enhance the overall competitiveness of MFT. Though chance cannot be decided by people, but we can find the way to take the good opportunities and we can also give advices to government for the development of MFT.

Some advices on factor and demand conditions, Related and supporting industries:

The Wenzhou area is inferior in this inherited resource compared with North Cape, thus the created resource for instance cultural innovation is more important. According to Porter's diamond model, enhance other determinants can also promote the overall competitiveness of MFT.

Tourist is the most important production factor for tourism. The large population in Wenzhou area, which is almost double of Norway, is the promising factor to develop MFT. The current situation is that the number of marine anglers in Wenzhou and surrounding area is increasing year by year. For one thing, with the governance of dealing with the river pollution, angling (use modern rod, the same as Europeans) became more and more popular, and more and more people are familiar with recreational angling. For another, Wenzhou people's personal income is increasing yearly and people's leisure demand will continue to grow. In addition, the government's stimulation can promote this industry. Thus, local MFT demand is increasing, and marine fishing will be a well-know sport in Wenzhou area in future.

According to the result of my fieldtrip, 30% of anglers are Dongtou residence, and 95% of anglers are ordinary workers who can not easy to afford high expenditure of MFT. Thus, MFT products should arouse the interest of higher-consumer groups. Marketing should focus more on places for higher consumer, such as upscale clubs. Moreover, fishing enthusiasts are dispersed distributed, most of them use the Internet to contact with each other and communicate their fishing information. Greater importance should be attached to network promotion and internet marketing, to attract tourists from other areas and other countries as well. In addition, the MFT should pay more attention to the combination with other industries such as tourism estate industry to enhance the unique coastal marine fishing culture. For instance Qingdao is building “beach house with berth and yacht”. These measures can make Chinese people more familiar with the meaning of MFT and other water-based activities.

The confusion in the regulation implementation in commercial fishery caused the overfishing. Thus the big catch is very difficult for MFT anglers. Though these situation can not easy to changes in short time, but the protection for some special type of fish maybe much easier. For example, Porgy is a kind of fish that can be more fun to sea anglers, and it can be found in every season in the sea. The conservation of Porgy, the minimum size or the ban in trade of Porgy can be suggested in the Wenzhou area.

Some advices on MFT firm strategy

MFT operators play a key role of the MFT commercialization. On the one hand, MFT operators should make more innovation to enhance the unique fishing culture. On the other hand, MFT operators should pay more attention to enhancing the service quality and the cooperation with tourism. Moreover, MFT operator should use proper marketing strategies to attract larger number of tourist anglers, for instance direct marketing among proven customer: give advertisement with reliable pictures and other information in WebPages that fishing enthusiasts usually used to share their catches and experience. MFT operators should try to win a good reputation among anglers from

local area and other countries and areas as well. In addition, MFT services and products should be diversified to meet different income levels and consumption demands. Providing accommodation, kitchen, and fish gutting room are suggested for tourist anglers. Most anglers have good cooking skill, and they are very pressure to share their harvest. Operators' services can lay more stress on cooking fish and sharing fish.

Some advices on government and chance:

According to Hall (1994), the tourism policymaking process theory, differ from North Cape, the environmental and resource protection problems are serious in Wenzhou. Government has now attached great importance to stimulate the MFT development, but more action should be taken on enhancing the quality of MFT products and MFT managements. Hence, governments, anglers and MFT operators should pay more strength to the policy, regulation implementation and environmental protection. Effective implementation and scientific standardized regulation can to promote MFT's development and growth. Contrarily, chaotic management must limit its development and growth. Although the environmental protection department and fishery department was set up very early. But there are still many problems in regulation and its enforcement. Currently the polluted sea water has not been dealt with, fish are polluted and fish stock is low. Fishery and environmental protection department should improve the legal system. Laws and regulations for MFT should come out in future. Then, the government should enforce the laws and regulations strictly to give a good condition to MFT development. Finally, government should maintain MFT in a sustainable way in resource use and managements.

Chapter five

5. The competitiveness advantage of FFT development compared with MFT in Wenzhou

5.1 The development of FFT in the Wenzhou area

There are mainly five villages involved in FFT in Dongtou county including: Dong'ao village, Dongaoding village, Jiuting village, Haixia village, Dongjiao village. At present, they own 165 beds in three star-level hotels. This capacity is far less than enough for tourists. Mostly, they rely on the private hotels run by fishermen, besides the local hotel. In 2009, 607,600 tourists participated in FFT and visited these fishing villages, which means an increase of 31.78% compared with the year 2008. In 2010, this industry created more than 250 employments in Dongping village. The sale of FFT in Dongping village is shown in the table 5.1. Fishing fun tourism (FFT) is an industry that autonomously operated by fishermen who use their own houses and life skills to sell mainly fishing village life experience to tourists. This industry includes sea food restaurants, hotels, shops, recreational boats and other sub-sector.

Table 5.1 The scale of FFT in DongPing village in 2011 (source: from local mayor of Dongping town)

Town s	Don g tou	Dong ao	Hui ming	Dong ao ding	Hou keng	Long tou	Zhon g lun	Song bo yuan	Da bei ao	Jin ao	Hou liao	Liao ding	Ao zai	Da qu	Total in the left	Total In fact
shops	32	10	11	26	7	7	25	4	8	2	15	4	4	3	158	316
hotels	1	15		2				1					1	1	21	84
Resta ur-ant s	11	11		7			5	3	1					1	39	254
ships	5	2											3		10	26

In 2010, the Yueqing recreational fishery Company own 12 ships, and they arranged

1115 trips for FFT visitors, the sale was around 287 thousand EUR (source: from local mayor of Dongping town).

Table 5.2 The difference between MFT and FFT

Difference	MFT	FFT
customer	Only fishing enthusiasts want go Marine fishing. Marine angling is not suitable to ordinary tourists. Thus it cannot develop to a large scale because it was not Chinese culture	Suitable to almost every tourists visits Dongtou Island
price	Living standards of Anglers in Wenzhou is lower compared with Norway, however, MFT is a high expenditure activity	Much lower in expenditure
government	Cannot develop to a large scale in a short time by private companies.	Started by fishermen and supported by government after it grew up to a large scale
law	Mainly season limit and fishing gears regulations from commercial fishery. No law or regulation special for MFT. A large group of people go fishing for food	Government gives a series of regulations and laws after it grow to a large scale. FFT companies are self-discipline by organizing FFT Associations.

5.2 The competitiveness advantage of FFT compared with MFT in Wenzhou area

Now, we are going to find the determinants why the “fishing fun tourism” becomes the most important water-based activities on the coast of the Wenzhou area, but not MFT as follow.

5.2.1 Factor conditions

Fishing Fun Tourism industry has more competitive advantages in Dongtou County than Marine Fishing Tourism because of the following reasons. The FFT in Dongtou County are more endowed than MFT in these factors: human resource physical

resource, knowledge resources, capital resource, infrastructure, and other created factors such as coastal fishing culture and tourism culture. Firstly, the Dongtou County is rich with tourism resource: 70.12 square kilometers scenic planning area, accounting for one fifth of the total county area (Dongtou government, 2011). There are over 400 major scenic attractions, well-known for its diverse and beautiful scenery. Dongtou as a tourist destination is endowed with seafood, sea view and other rich tourism resources to meet the needs of the consumers. Secondly, there are a lot of surplus labor—fishermen in these Dongtou fishing village (interview with mayor in Dongtou in my fieldtrip). They are familiar with the sea, and they cast nets and sing fishing songs in boats, thus their life experience is an attraction to FFT tourists. Moreover, the cross-sea bridge built in 2006 make convenient traffic, and hotels, shops and other ancillary services facilities are well developed and accessible. In addition, the management experiences and tourism institutions in local government helped with the FFT development. At the same time, these factors make the marine fishing more active among Dongtou residences, but not the well-established MFT.

Advanced factors are the most significant ones for competitive advantage. They are necessary to achieve higher-order competitive advantages such as differentiated products and proprietary production technology. The cooperation between MFT and government can provide more advanced human resource such as marketing managers for fishing fun tourism. Fishing fun tourism serves as a complement of tourism product to other Dongtou tourism products, and marketing conducted by government that enhancing the Dongtou Island as the destination can bring more customers to FFT. Thus, with these advanced factors, the effective and efficiency of FFT can be enhanced. However, MFT cannot easily share the same marketing channel as FFT, because marine fishing marketing should be focused more on enthusiasts, or the people who like to do angling before they travel.

5.2.2 Demand conditions

The demand of fishing fun tourism is larger than marine fishing tourism. The fishing fun tourists are from other region nearby Dongtou County in Wenzhou, Taizhou, Quzhou area, and other big cities surrounding, for example, Shanghai and Taiwan. The number of visitors is larger than hotel's capacity, thus fun fishing tourists have to live in the local people's own houses (which are not hotel).

Firstly, the fishing culture of fishing fun tourism is more suited for the Chinese people and meet people's the growing marine tourism demand. The various fishing activities of fun fishing tourism are suitable for almost every tourist visiting Dongtou, whether they are family travelers or travelers accompanied with friends. Tourists go fishing with fishermen who use their nets to do fishing. In effect, the tourists do not participate in the fishing activities but rather observe the local fishermen carry out the fishing. The fishing fun tourism is thus easier to market than marine fishing tourism. Dongtou fishing fun tourism is largely marketed with focus on miners, labor unions and students. Dongtou government cooperated with local media in several cities for its marketing. However, marine fishing is a European recreational sport and a large number of Chinese tourists are not familiar with it. It is only common among those tourists who have a strong special interest in fishing. Even though women, occupy about half of the population of Dongtou, only few of them participate in fishing and hence they are not a large part of the tourism industry.

In addition, fishing fun tourists not only come to take boat for fishing, but also enjoying coastal scenery in the boat and experience the traditional fishing life in fishing villages. Thus, tourists are not concerned so much about the catch as much as compared to marine fishing tourism anglers. The fishing fun tourism market thus relies less on the fish resources. Additionally, fishing fun tourism is less affected by the weather, temperature and other elements that anglers of marine fishing tourism considered important and are determining factors in the tourism activities.

Secondly, the price of ‘fishing fun’ is much cheaper than marine fishing per trip. While, most marine fishing activities are conducted by upper socio-economic groups, and when it comes to fishing this is often reflected in the cost of equipment and clothing (Øystein Normann, 2007: 239-245). At present, the fishing enthusiasts in Wenzhou cannot easily afford the high expenditures and cost associated with marine fishing tourism. Thus, the fishing fun tourism meets the local tourists’ consumption capability and represents current demand.

Thirdly, there was large number of excess rural labor in fishing villages such as Dong’ao village, Dongaoding village, Jiuting village, Haixia village, Dongjiao village. Therefore, fishermen are easily organized spontaneously and as and when there is the need for them to operate this business.

Though marine fishing tourism do not have good demand condition compared with fishing fun tourism and it has not been well developed until now. But there are still some good opportunities for its development in future. These following good opportunity may enhance the competitiveness of marine fishing tourism industry and increase the demand in Wenzhou as well.

The increasing marine tourism demand from cities in Shanghai, Taiwan, Fujian province and other inland provinces are the best opportunity for the fishing fun tourism development. However, marine fishing tourism has not received many tourist anglers and should find way to catch up with this good opportunity.

Secondly, large investment from local government in fishing fun tourism is another chance for it to develop into a world class industry. Even though the government has not invested in the fishing fun tourism by way of financial supports such as loans, the government rather invested through the organization and holding of holiday festivals, and job trainings offered local operators of fishing fun tourism. These investments

activities are based on the assumption that the successful organization and operation of fishing fun tourism would contribute to the growth of the gross domestic product (GDP) of the local area and create revenue source to the government. Marine fishing tourism on the other hand has received little attention from the government making its development and growth in the Dongtou County, much more difficult compared to fishing fun tourism.

Moreover, in March, 2011, the national government has ratified the rent of the seven uninhabited island in Wenzhou. These islands have quiet reefs but lack the necessary facilities for the development of fishing fun tourism. This will provide more natural resources available for the development of marine fishing tourism, and may be a good opportunity for the development of marine fishing tourism in the future. Though right now, there are little successful investment cases, and little direct economical advantages gained from these uninhabited islands. With the accumulation of experiences in entrepreneur in the fishing fun tourism in Dongtou Island and tourism companies in other places, the uninhabited islands may attract more investments from tourism industry in future, thus will promote MFT development.

5.2.3 Related and supporting industries

Tourism culture and commercial fishery are main industries in Dongtou area. In 2009 the whole county received 1.76 million tourists, and tourism income reached 86.3 million EUR, accounting for 21% of the county's GDP. There are 8660 tourism employments in this county, containing chef, guides, skippers, tourism managers and so on (Data collected during my field trip). The well-developed tourism drives the development of restaurants, transportation, accommodation and other tourism industry. The tourism development provides facilities and gives the foundation for fishing fun tourism and fishing fun is a part of the tourism industry. Fishing fun tourism and other tourism activities, such as museums, aquarium and sea golf, diversified the destination activities and play a complementary role to each other.

The main difference between fishing fun tourism and marine fishing tourism is the latter's great reliance on fish resource. Dongtou islands have attracted some anglers to come for fishing, but are not so endowed with superior resource to support this particular type of fishing. In my questionnaire survey, all the informants (sea anglers) in Wenzhou visited Dongtou islands for angling. 10 of them are not very satisfied with the catch in Dongtou. Some of them tell me that "The big catch of Porgy in Dongtou is more and more difficulty year by year", "big catch is not easy because of overfishing by commercial fishery" and "In Wenzhou, Nanji Islands and Taishan islands (in Fujian province south of Wenzhou) are the best fishing palace for its good environment and the catch". Tourist anglers from Fujian area said fishing in Taishan islands are better than Dongtou islands. Anglers' operational areas always changes according to the catches and weather. They do not go fishing in any fixed area.

5.2.4 Firm strategy

FFT operators are mainly local fishermen. In the beginning, fishermen from fishing villages lack the necessary start-up capital and they start business by the means of joint-stock. When the number of tourists is larger than the hotel capacity, the local people used their own house to do business which was not allowed by local government. After discussion and inspection by local Public Security Bureau, the County Planning and Construction Bureau, County Health Department, County Tourism Bureau, the county Chamber of Commerce and Industry, County Fire Brigade, mayors in local towns, they are allowed to do this business. Thus they are allowed to host tourists in their homes.

Later when fishing fun tourism grows to a larger scale, they cooperate with Shanghai tourism agencies, with the helps from local government in marketing. Now its market has expanded to inland provinces. In addition, they receive job trainings such as guides training, chef cooking training, to enhance the service quality.

5.2.6 Government's role in MFT and FFT

The Fishing Fun Tourism Associations (FFTA) in Dongping County which is a part of Dongtou introduced several self-disciplines into fishing fun tourism. They have instituted regulations and industrial-management-practice standards such as “FFT Restaurant Association standard rules and regulations”, “FFT restaurant management and service quality standards”, “FFT restaurant service quality rating measures,” “FFT recreational boats service quality standards” and other related industry service standards regulating the services quality in Dongtou. Dongtou Tourism Administration and Quality Supervision Bureau helped Fishing Fun Tourism Associations to make the standardized management regulations.

Fishing fun tourism was regulated by local government after it grew up to become a relatively large scale industry. However, on the other hand, marine fishing tourism cannot be well-established and its market is still small at present. There are several laws and regulations that are still there and must be established in future to regulate the sector and make the tourism industry a much more sustainable one. Services and managements in MFT are waiting to be enhanced, as well as marine fishing culture, For instance, Qingdao is building “beach house with berths and yachts”, and MFT can combine with other industry such as tourism estate industry to enhance the unique coastal Marine fishing culture.

Currently, Wenzhou government is promoting both FFT and MFT. In the Yacht Club projects, 300 yacht berths are under construction. To enlarge the reception capacity, Dongtou County is accelerating the construction of high-star hotels. The county own two three-star Hotels and one two-star hotels. In addition, there are five high-star-different-topic hotels under construction (including three four-star and two five-star hotels). In order to diversify the activities for FFT tourists, some resorts are designed to have characteristic theme, for example, Gold Coast Water New Century Resort have the theme of pro-sand play, East Harbour Leisure Center (apartment-style

hotel) have the theme of marine fishing and artificial hot spring water and so on.

In the case of MFT in Wenzhou, government is playing role of stimulation. Neither Wenzhou local government nor national government plays the function of legislation, regulation, or planning. But local government in Dongtou regulate FFT strictly and they also give bylaws

Secondly, Wenzhou local government merely provide basic infrastructure such as roads and sewage, and government does not play direct entrepreneurial role in MFT and FFT. Thirdly, as I mentioned above, according to Mill and Morrison (1985; Hall, 1996: 41) government can stimulate tourism in ways of financial incentive, sponsoring research and generating tourism demand, such as marketing, promotion and a visitor serve. The local government in Dongtou County helped with the marketing FFT directly. On the one hand, the Dongtou government helped with the advertisement of FFT by cooperation with tourism agencies in Shanghai and Medias in Lishui city (another surrounding city). The government also learned fishing fun tourism culture from other areas and held the “Dongtou Coastal Culture Festival”. Dongtou government also cooperates with tourism agencies directly and organized groups of tourists who visited Dongtou “two day trip for one thousand tourists from Shanghai to Dongtou”. Moreover, the government do job training such as guide training and chef training to enhance the service quality and attract repeat customers. Currently, government does not help with sponsoring research in MFT and FFT. Moreover, government will play role of financial incentive by direct investments in FFT. For the MFT, the yacht-theme hotel invested by government is still under construction.

5.3 Suggestions for MFT further development

FFT developed quickly in Wenzhou because there are many advantages in factor conditions, demand conditions, related and supporting industry, firm strategy and government roles. These factors made the FFT developed in a better situation than

MFT. With the present growing marine tourism demand of Wenzhou people, both MFT and FFT need to be enhanced in the Wenzhou area.

Fishing fun tourism make full use of the advantages of the marine tourism resources in Dongtou Island, and is good for sea fishing the further utilizing and development of the coastal tourism resources. MFT can also take the advantage of these tourism resources and explore some key recreational fishing areas with clean environment, different prices, good service quality, abundant catches, and good reputations first.

Secondly, unique local culture and advertisements by government and FFT firms attracts tourists to come and thus bring the market to FFT.

The fishing fun tourism has the specific Chinese culture characters and unique Wenzhou local culture, for instance, it combined some Chinese customs, habits and the Wenzhou cuisine' cooking style. The characteristic culture added value to the FFT products. These FFT characters are much more easily related to the Chinese culture than MFT. Hence, FFT can attract not only tourists from other part of Wenzhou, but also tourists from inland provinces and cities far away: Yunnan province and Beijing city.

MFT should cultivate its local market first to support this industry. MFT can take its own advantage of the new sport culture. Some novel proposals can be taken to create new leisure concepts among the young people in Wenzhou. In fact, now the ages of anglers in Wenzhou area are between 25 and 45, and great majority of them are more than 30. They can therefore easily accept these new fishing sports. Therefore, this sport is easier to be accepted by young people in Wenzhou, and this sport is also a fashion to young people aged around 20. MFT Marketing can focus more on these young people. Most local anglers said the expenditure of marine fishing is not expensive because there is little travel cost and other service expenditure. So the promotion of the marine fishing sport in Wenzhou local area does not have high requirements for people's personal

income (fieldwork in Wenzhou). The MFT should lay more stress on how to let more people familiarise with the sport and experience the happiness of this sport.

Thirdly, regulations from FFT associations and policy from local government are essential to FFT to ensure quality of services and managements in FFT. Marketing strategies, knowledge, innovations are required when it develops to a large scale and thus require larger investments from government in the future. However, MFT is not easy to grow up by itself for its current small market and high investments and service quality it requires. Therefore, the MFT cannot easily absorb investment from private companies, and needs investment from tourism companies and other private companies with the help of government.

Moreover, there is no regulation on the Industry standard to maintain a good order in MFT development and competition. Sometimes local anglers take the poor ships that are not safe but low rent. Now MFT has not been well-established, these regulations should come out in future.

Chances cannot be controlled by MFT operators and government. Some measurements some regulations on the boat qualities are imperative to ensure the safety of the anglers. The limit or educations on launching out to sea during the bad weather days, such as typhoon period, can also improve the safety of anglers. It is more important for marine fishing tourism to take the opportunity of growing marine tourism demand. Wenzhou marine fishing tourism can accumulate more experience from FFT development. Because of the similarity between marine fishing tourism and fishing fun tourism, many MFT industrial regulations can be similar as FFT. Organizing marine fishing tourism association can strengthen the self-discipline of this industry, thus can also promote this industry.

Chapter six

6. Conclusion

This paper analyzes the competitiveness of MFT in Norway and Wenzhou, and compared MFT with FFT, to find the weakness of MFT development in Wenzhou and finally seek the approaches to develop marine fishing tourism in the Wenzhou area and North Cape, Norway.

Through comparison and analysis of the four determinants, chance and government in marine fishing tourism in North Cape and Wenzhou, North Cape MFT is more internationally competitive. The successful case of MFT in North Cape brings to light the importance of the four determinants, chance and the important government role as well.

North Cape is endowed in natural resources and created factors. Unique fishing culture, abundant fish resource, well-developed tourism and commercial fishery created good factor conditions, demand conditions, good related and supporting industries situation for North Cape marine fishing tourism. Especially, the unique recreational marine fishing culture in European countries provides strong support to North Cape demand condition. Compared with Norway, environment is polluted, resource is limited, and not so many people are familiar with the European marine fishing sport in Wenzhou area. Moreover, direct marketing strategy in Germany and other good firm strategies made MFT firms succeed. In addition, the development of North Cape MFT shows that government plays an important role in regulations, investments for MFT operators who do not own start-up capital, but tourism department in local municipality did not success in their marketing because they mainly focus on selling the North Cape not marine fishing tourism products. On the contrast, the MFT has not been well established in the Wenzhou area. The implementations of regulations on environmental and resource protection, investments from private sector and government are required

for the further development of MFT in Wenzhou. In order to enlarge the scale of MFT in North Cape, governments could help with improving the demand condition with MFT operators in North Cape. Governments should lay more strength on regulating resource use and developing “sustainable marine fishing tourism” in future. Currently, all MFT companies in North Cape are the family-run business, this do not hamper the competitiveness of MFT obviously. Imitation but not innovation is the important way for MFT operators to develop their business. However, when the MFT grow to be a larger business in future, MFT operators should shift their firm strategy.

The people's increasing leisure demand stimulated the marine tourism development. Both FFT and European MFT occurred in the Wenzhou area. FFT industry have better proximate environment to gain competitiveness in terms of factor condition, demand condition, firm strategy and government. According to the analysis above, current situation is that, FFT industry is more suitable to develop in the Wenzhou area compared with MFT. Therefore, operators in MFT need to take its product's own advantage of “being new culture for Chinese” to provide some personalized service and strengthen its self-discipline to develop this industry. Now government is stimulating the MFT industry, but less actions has been taken in its regulations, investments, marketing as so on, thus it needs government's help in future.

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Attachments

Attachment 1 Questionnaire survey for tourists in North Cape

(Please tick✓the appropriate box) :

1. Is marine fishing an important part of your trip to North Cape? Yes ☐ No ☐
2. Will share your North Cape-fishing experience with your friend and recommend fishing to them? Yes ☐ No ☐
3. What do you consider good quality as a fishing tourist? (tick more than one boxes)
 - a. Good scenery in coastal area ☐
 - b. Special type of fish ☐

Which type?

King crab ☐ coastal cod ☐ turbot ☐ anglerfish ☐ Seal ☐ halibut ☐
catfish ☐ other type _____

- c. All different types of fish ☐
 - c. Big catch ☐
 - d. Good service in fishing camp ☐
 - e. Cook and Share your fish after fishing ☐
 - f. Good boat and rod ☐
 - g. Spend time with particular person ☐
 - h. Other _____
4. In what ways do you think they can improve the quality of fishing tourism?

5. Are you satisfied with marine fishing? Yes ☐ No ☐
6. How did you hear about fishing tourism in North Cape? _____
7. Do you agree with government regulations or restrictions in marine fishing tourism?
☐ Yes, regulation is a must to have sustainable fish stock for tourists
☐ No, I do not like it. I want go fishing free

Other opinion on these regulations _____

8. Do you think fishing tourism is negatively affecting biodiversity?

☐ Yes, why yes? _____

☐ No, why not? _____

Your Nationality: _____

How much do you spend in this trip? _____

How much do you spend in fishing in this trip? _____

How long is your trip here? _____

Your gender: ☐ male ☐ female

If you are a female tourist angler:

1. Do you usually go fishing before coming to North Cape? Yes ☐ No ☐

2. Why do you go fishing?

a. You love fishing ☐

b. Fishing is special in North Cape ☐

How special? _____

c. You spend happy time with your friends ☐ your family ☐

d. You spend happy time with friends ☐

Attachment 2 Questionnaire for marine anglers in Wenzhou

This survey is for master student research in UIB, and will not be use for any commercial purpose

Please send to this email address when you finish: zxjcigar@yahoo.com.cn

It will be appreciate of you if you can send this questionnaire to your other angling friends.

ASSIGNMENT NO. : _____

INTERVIEW TIME: _____

DATE: _____

PLACE: _____

FISHING SITE: _____

1. Do you like marine fishing, if yes, why do you like marine fishing?

Suggested answer (Please tick✓ in the appropriate box, multiple responses are allowed):

1. Can catch more types of fish than fresh water fishing ☐
2. allows me to develop and improve fishing skills ☐
3. Is exciting ☐
4. Gives me a sense of winning ☐
5. Gives me a sense of accomplishment ☐
6. Allows me to spend time alone ☐
7. Fishing gives sense of peace and relax ☐
8. Marine fishing requires more fishing specialty than Inland fishing ☐

2. What is the most important element to motivate you to go fishing?

3. How did you learn fishing?

4. If you go both inland fishing and marine fishing, please tell me the reason why you go both of them, but not only one of them?

5. Do you go fishing for particular type of fish (Please tick ✓ in the appropriate box):

1. Yes ☐ 2. No ☐

If yes, what type of fish do you like to catch (check ✓ multiple choice)?

6. Do you think the fish stock here is abundant? (Please tick ✓ the appropriate box)

1. Yes ☐ 2. No ☐ why not _____

7. Do you think the overfishing is serious here because of commercial fishing (Please tick ✓ the appropriate box)?

1. Yes ☐ 2. No ☐ _____

8. Are there any competition between fisher men and anglers?

If yes, could you please give examples? _____

9. Are you satisfied with marine fishing? (tick ✓ only one)

1. Yes ☐ 2. No ☐

10. Are you satisfied with environment here? (tick ✓ only one)

1. Yes ☐ 2. No ☐

11. What do you consider good quality? (tick ✓ more than one boxes)

a. Good scenery in coastal area ☐

b. Special type of fish ☐

What type?

c. All different types of fish ☐

d. Big catch ☐

e. Good service in fishing camp ☐

f. Cook and Share your fish after fishing ☐

g. Good boat and rod ☐

h. Spend time with particular person ☐

i. Other _____

12. Do you have any advice in how to promote marine fishing?

13. Have you been other better fishing sites? Why that place is better than here?

14. How much did you, spend on fishing for this trip?

Tackle _____ Bait _____ Food and ice _____

Other items _____ In total for this trip _____

How much in total do you cost in fishing per year? _____

About how many days do you spend fishing in a typical year?

Under 10 ☐ 10-20 ☐ 20-30 ☐ 30-50 ☐ 50 and over ☐

Background

This part of survey is to keep secret

Where are you from? _____

Your Gender: Male ☐ Female ☐

How much percent of your income do you want spend on fishing? _____

Could you please tell me the age and income brackets into which you fall? (Please fill one number 1~6 on the underlines)

Age _____		Annul income _____	
Under 16	1	under £ 10000	1
16-25	2	£ 10000-19999	2
26-35	3	£ 20000-39999	3
36-49	4	£ 40000-59999	4
50-60	5	£ 60000-79999	5
60 an over	6	£ 80000 and more	6

Attachment 3 Interview guide for MFT officials in North Cape

1. When and how was marine fishing tourism started in North Cape?
2. Government said they develop MFT because of its employment and regional economic contributions. So, to what extent is marine fishing tourism a tool economic development and employment creation in North Cape?

What advantages of North Cape do you think makes it favorable for the development of MFT?

3. What conflicts exists between the commercial fishing industry and MFT industry?
And how are these conflicts resolved?
4. Do you think managing only the effects of commercial fishing is adequate to provide protection of habitats and sustainability of fisheries resources or not?
5. If not, did government attempt to evaluate and control recreational fisheries and its ecological impacts?
6. What role does the local community play in the MFT industry?
7. What did the government do to strengthen the development of recreational fishing at its initial or take-off stage? Details in investments?
8. Could you please tell us what other investment you are doing now to develop the marine fishing industry as a whole?
9. What kind of role did government play in Marine fishing tourism? Does it represents an active involvement, a laissez-faire approach or somewhere in between? (Why did the government choose a particular approach identified above?)
10. What legislation established and legitimize MFT, and how do you implement them?
 - a. Does the introduction of export quota starting 1 June 2006 limiting the quantity of marine fish or fish products from recreational fishing that can be exported from Norway to 15 kg per person has any positive effect on MFT?
 - b. Did the number of recreational fishing tourist decline because of the above?
 - c. How do you enforce these restrictions?

- d. Is there growing pressure on fish stocks from recreational fishing in North Cape?
 - e. How did you prevent fish stock reduction in MFT?
11. Would you say MFT ecologically sustainable? What can make sustainable development of MFT? Could you talk about your obstacles and how you resolved these problems?
12. Are there restrictions on the number of anglers that participate in recreational fishing when the ecological impact of MFT is serious / in peak season of tourism in North Cape?
13. Do you have data on the following in North Cape in past 5 years or longer (if no English data, Norwegian data is appreciated the same)?
- 1. Species type
 - 2. Annual recreational catch
 - 3. Annual commercial catch

Attachment 4 Interviews for MFT Operators in North Cape

1. Why did you choose North Cape to start your business in this industry?
2. Are you satisfied with the fish stocks here?
3. Have you received any training from government before starting your business?
If yes, what type of training and how has it helped your business?
4. How do you advertise your business? How do you attract more customers?
5. Where are your customers from? Do you have Norwegian customers?
6. How do you recruit your employees? What skills do you require of them?
7. How much do you get annually from your business?
8. How many beds do you have? How many boats do you have? How do you deal with seasonality?
9. Do you think the fish stock is seriously declined because of commercial overfishing?
10. Does fishing tourism compete for fishing ground with commercial fishing?
 - a. Did government mediate your conflicts? How?
 - b. Which party did the government considered more economically and ecologically viable? Commercial fishing or fishing tourism?
11. Could you talk about your attitude with the planning of MFT at present?
 - a. Are you satisfied or not?
 - b. Does the government engage you in the planning process?
12. Did the government help with your business? Could you tell me some specific issue of their helps?
13. How assess the governments' performance in marine fishing tourism? Does government interference help you or disturb your business? Please explain further what you think about governments' role in MFT.
14. What kind of restrictions did the government give which limited your business the most? Does restrictions like export quota and restriction on West Cod, selective fishing gear reduced your customers?

15. Does the government educate you about the minimum size of fish; cod and season limits?

Attachment 5 Interviews for FFT Operators in Wenzhou

1. Why did you choose Dongtou to start your business in this industry?
2. How do you think other tourism business here? Are they helping your business or disturb your business?
3. Are you satisfied with the fish stocks here?
4. Have you received any training from government before starting your business? If yes, what type of training and how has it helped your business?
5. What kind of service do you provide to your customers?
6. How do you advertise your business? How do you attract more customers?
7. Where are your customers from? Do you have many Wenzhou customers?
8. Did you recruit employees? What skills do you require of them?
9. How much do you get annually from your business?
10. How many beds do you have? How many boats do you have?
11. How do you deal with seasonality?
12. Do you think the fish stock is seriously declined because of commercial overfishing?
13. Does fishing fun tourism compete for fishing ground with commercial fishing?
 - c. Did government mediate your conflicts? How?
 - d. Which party did the government considered more economically and ecologically viable? Commercial fishing or fishing fun tourism?
14. Could you talk about your attitude with the planning of FFT at present?
 - c. Are you satisfied or not?
 - d. Does the government engage you in the planning process?
15. Did the government help with your business? Could you tell me some specific issue

of their helps?

16. How assess the governments' performance in fishing fun tourism? Does government interference help you or disturb your business? Please explain further what you think about governments' role in MFT.
17. What kind of restrictions did the government give? What kind of regulations did the Dongtou FFT association give? Which limited your business the most?
18. Do you have any advice to promote FFT in Wenzhou area in the future?

Attachment 6 Interview guide for FFT officials in Dongtou county in Wenzhou

1. When and how was fishing fun tourism started in Dongtou?
2. What advantages of Dongtou do you think makes it favorable for the development of FFT?
3. How did government helped with FFT marketing?
4. Government said they develop FFT because of its employment and regional economic contributions. So, to what extent is fishing fun tourism a tool economic development and employment creation in Dongtou?
5. What did the government do to strengthen the development of fishing fun tourism at its initial or take-off stage? Details in investments?
6. Could you please tell us what other investment you are doing now to develop the fishing fun industry as a whole?
7. How do you consider the relationship between Commercial fishery and fishing fun tourism? What kind of benefit did the fishing fun tourism get from commercial fishery most?
8. What conflicts exists between the commercial fishing industry and FFT industry? And how are these conflicts resolved?
9. What kind of role did government play in Marine fishing tourism? Does it represents an active involvement, a laissez-faire approach or somewhere in between? (Why did the government choose a particular approach identified above?)
10. What legislation established and legitimize FFT, and how do you implement them?
 - a. Does the introduction of regulations from government and fishing fun tourism association have any positive effect on FFT?
 - b. Did the number of FFT tourists decline because of the above?
 - c. How do you enforce these restrictions?
 - d. Is there growing pressure on fish stocks from fishing fun tourism in Dongtou area?
 - e. How did you prevent fish stock reduction in FFT?

11. Would you say FFT ecologically sustainable? What can make sustainable development of FFT? Could you talk about your obstacles and how you resolved these problems?

12. What role does the local community play in the FFT industry?

MFT:

13. Though I know MFT has not been well-established before I come, could you talk about the development situation of marine fishing tourism in the Dongtou area?

14. Are there any preconditions in Dongtou County for MFT development?

15. What kind of reasons do you think hampered MFT development in the Dongtou area?

16. Does government have any planning for MFT development?

17. Are there other measures been taken for MFT development?

18. Did the government help with the development of MFT? How did the government help with MFT?

19. What do you think the government can learn from FFT development to enhance the MFT?